

TERMS OF REFERENCE

Implementation of the IP digitization and paperless IP system

PARAGUAY

PR-T1260

Enhancing Intellectual Property (IP) Management in Paraguay: IP digitization and implementation of paperless system

1. Background and Justification

- 1.1. Paraguay handles the administrative procedure of intellectual property application and registration manually to process the paper documents which poses delays and potential errors. The general objective of the project is to upgrade the Intellectual Property Rights (IPR) system in Paraguay by supporting the National Directorate of Intellectual Property (DINAPI) to bring forth the initiative of e-government to enhancing public sector efficiency, effectiveness and accuracy of administrative procedures through automatization and providing greater accessibility through digitizing its services online.
- 1.2. Through the National Development Plan 2014-2030 (PND, Plan Nacional de Desarrollo 2014-2030), the Government of Paraguay aims to accelerate competitive, sustainable and knowledge-based economic development. Three strategies of the plan are poverty reduction and social development, inclusive economic growth and insertion of Paraguay in the world. To transition from natural resources-based economy to a knowledge-based one, Paraguay aims to pursue progressive development of the national innovation system. Development of open and transparent government and increasing the number of industrial patents is some of the key strategies for pursuing inclusive economic growth based on competitiveness and innovation.
- 1.3. According to the International Property Rights Index in 2017, Paraguay ranks in the 100th place out of the 127 countries. Three pillars of the index include legal and political environment, physical property rights, and intellectual property rights. In comparison to the global and regional standards, areas of weakness for Paraguay includes judicial independence, control of corruption, protection of physical property, and protection of intellectual property rights as the Paraguayan IP system is exposed to high level of piracy and counterfeiting and serious delays in granting patents. In 2015, Paraguay has had a total of 339 patent applications; 323 from the non-residents and 16 from residents. In the same year, 10 patents were granted.
- 1.4. DINAPI is the national institution in charge of the administration of patents, utility models, trademarks, denominations of origin, geographical indications and industrial design in the country. It has developed the National Plan of Intellectual Property 2030 (Plan Nacional de Propiedad Intelectual 2030) to strengthen the institutional capabilities and to contribute to the transition towards knowledge-based, diversified and competitive national economy. Currently, DINAPI utilizes outdated procedures and systems to fulfill its role, without taking advantage of the recent changes brought by the new digital technologies and automation. In addition, delays are worsened by limited human resources and inefficient paper-based manual administrative processes. Paper-based applications and examinations are stored in limited and inadequate physical spaces.
- 1.5. Automation and digitization are essential to systematically manage and administrate IP information. Furthermore, automation and digitization of the IP information allows IP institutions to provide quality services to innovators and other users. Innovators can also avoid duplication in R&D activities and investment.

2. Objectives

2.1. The main objective of this TC is to upgrade the Intellectual Property Rights (IPR) system in Paraguay by supporting the National Directorate of Intellectual Property (DINAPI). The specific objectives of the project are:

- (i) to implement an IP document digitization system from paper-based applications
- (ii) to implement paperless IP system that incorporate the digitized IP documents as inputs for enhanced efficiency, effectiveness and accuracy for IP management and informatization
- (iii) to conduct capacity building to enhance the institutional capacity of DINAPI for the operation and use of the newly implemented system as well as the IP policy capacity
- (iv) to raise public awareness of the IP system as a key tool for innovation by conducting open seminars

3. Scope of Services

3.1. The consulting firm will design, establish and implement the IP digitization and paperless IP system, will provide internal training for the use and operation of the established system, hold institutional capacity building program to enhance the IP administration system, conduct open seminar for the public to raise awareness, carry out pilot digitization program for on-site training. The consulting firm will purchase necessary equipment to upgrade the IP administration system. The duration of the project is 18 months.

4. Key Activities

The consulting firm will carry out the following key activities that will facilitate the achievement of the objective.

- 4.1. Implement the IP document digitization system to generate electronic data and establish the online filing system. Paper-based documents of IP applications attached documents, interim documents, processing fee receipts will be digitalized and converted into electronic documents
- 4.2. Implement a paperless IP administration system to process and store the digitalized documents. The system will allow browsing and viewing of all digitized IP documents on the web. This system will also provide electronic approval services for each IP application lifecycle such as confirmation of submitted applications, approval of formal examination and substantive examination results, registration of IP official's opinions, making approval and disapproval of the IP application, and granting electronic signatures. This system will handle all notifications and reports generated in the IP information system of DINAPI. In the paperless IP administration system, the examiners and approvers can be selected, assigned and replaced in the workflow. In the approval process, the digitized document will be converted to prevent forgery or alternation and to secure its authenticity for document security. This system will operate in conjunction with the existing IP administration system of DINAPI.
- 4.3. Conduct internal training workshops to provide in-house training for DINAPI officials to manage digitization and paperless IP system as well as the IT system to equip with knowledge on operation and maintenance of the IT infrastructure and system.

- 4.4. Conduct institutional capacity building program for DINAPI managers in effective IP administration system, IP management policy, informatization strategy to build long-term institutional vision and goals.
- 4.5. Open dissemination seminars will be co-organized by KIPI and DINAPI to raise public awareness on the IP, build capacities of the new IP automation system and to train the external users. The target audience of the seminars will include the SMEs, research institutes, universities and patent attorneys to disseminate knowledge and capacity related to IP. Seminars will be held in Asuncion and Ciudad del Este. The seminar program and training materials will be developed for DINAPI to repeat the dissemination seminar and user training in the future whenever deemed necessary.
- 4.6. Pilot digitization of 1,000 IP documents: Expert(s) will be dispatched to provide practical user training to DINAPI officials that are responsible for digitization and examiners by supporting digitization of the stock of 1,000 patent documents (registered and pending). The expert will provide on-site assistance to digitize the 1,000 documents currently stored in the archive room. After being transferred to a digital format, the documents will be made accessible in the paperless system. Through this pilot program, the know-hows and knowledge to operate the digitization system will be shared with the DINAPI officials that will gain experience from hands-on training and learning-by-doing. The pilot digitization will also provide the opportunity to test the system.
- 4.7. Upgrade the outdated equipment for improved performance including servers, high-resolution scanners, and software such as OCR, backup solutions, data base, editable PDF solutions, and image correction solutions. The consulting firm will acquire the software and hardware equipment necessary for the implementation and operation of the IP digitization system and the paperless IP system with the administrative support of the DINAPI. All goods obtained through the TC will be transferred to the beneficiary, DINAPI.

5. Deliverables

The candidate will be responsible for the following deliverables:

- 5.1. Product 1. Inception report: The Inception report will include the detailed work plan including the milestones, tasks and responsibilities of the consultant based on activities. The inception report shall also include the design of the IP digitization and the paperless IP system. It should be submitted within two weeks of signing the contract. It will be submitted at least two weeks prior to the first field mission to provide the basis for the first work meeting between the consultant and the DINAPI.
- 5.2. Product 2. Establishment and implementation of the IP digitization system: Based on the design agreed with the DINAPI in the first mission, the consultant will establish and implement the IP digitization system to create digitalized data of the paper applications, intermediary documents and the receipts, etc. Upon installation, the consultant will also test and validate the system to ensure the functional correctness of the system. This deliverable will provide the input for the establishment of the paperless IP system.
- 5.3. Product 3. User manual and operation manual for IP document digitization: The consultant will develop a detailed user manual and operation manual for the DINAPI to sustain the production of high quality digitized documents and to ensure productivity. The manual will include the system overview, work flow, system operation, processing overview, security, troubleshooting, guidelines for maintenance, etc.
- 5.4. Product 4. Establishment and implementation of the paperless IP system: The paperless IP system will be established and implemented to allow the DINAPI officials and the examiners to

perform their functions by uploading the digitalized documents for electronic authorization online. The paperless IP system will include system administrative and configurative functions to designate the official in charge of approval and authorization. Upon installation, the consultant will also test and validate the system to ensure the functional correctness of the system.

5.5. Product 5. User manual and operation manual of the paperless IP system: The consultant will develop a detailed user manual and operation manual for the DINAPI to sustain the production of high quality digitized documents and to ensure productivity. The manual will include the system overview, work flow, system operation, processing overview, security, troubleshooting, and guidelines for maintenance, etc. The consultant will also provide in detail how the newly established system can be used effectively in parallel to the existing CENTURA system.

5.6. Capacity building program:

- i) Product 6. Internal training workshop: Two internal training workshops will be held. The consultant will develop, organize and facilitate capacity building program for the use, operation and maintenance of the newly established system. The consultant will also develop training materials needed for the capacity building program for the internal training workshop.
- ii) Product 7. Institutional capacity building program: An institutional capacity building workshop will be organized and facilitated by the consultant for the DINAPI to enhance its capacity as an organism designated to promote and administer the IP in Paraguay. The curriculum of the capacity building program will include but not be limited to the policies and strategies for IP administration informatization, evaluation, examination, and promotion in both application and use. It will provide an internal participatory space to discuss the milestones for IP informatization and institutional roadmap for upgrading the IP administration and management system.
- iii) Product 8. Open seminar programs: Two open seminar will be held to promote the application and use of the IP. The consultant will develop, organize and facilitate programs in collaboration with the DINAPI and to develop workshop materials to raise awareness on the IP especially targeting the SMEs, research institutes, universities and patent attorneys to disseminate knowledge and capacity related to IP.

5.7. Product 9. Pilot digitization program: The consultant will dispatch technicians to the DINAPI to support digitalization of 1,000 documents through on-site practical user training. The consultant will conduct system testing after the establishment to ensure its effective operation and stabilization.

5.8. Product 10. Project completion report: The project completion report will summate the activities carried out in the project. In addition, the consultant will provide IP administration informatization plan and institutional roadmap for upgrading the IP management and administration system including recommendations for enhancing the legal, institutional and organizational framework for advancing IP system in Paraguay.

5.9. Monthly project progress report

6. Qualifications

6.1. Experience of the firm/organization: The consulting firm will have at least 20 years of experience

in operation and management of IP information system. In addition, the consulting firm shall have at least three relevant project experiences in establishing and enhancing IP information system and IP administration system in the last five years. Previous working experience with DINAPI and knowledge of the Paraguayan IP system is preferred. The firm shall have technicians and engineers available for implementation of the project with the following minimum qualification and experience.

6.2. Team composition: The consultant must include at least one project leader and project coordinator. The proposed team leader will shall hold an advanced degree, at least Master’s level in IT, business administration, computer science and engineering, public administration, IP law, international development, or related disciplines. The team leader shall have at least 10 years proven experience in IP information and administration system in establishment, operation, and/or management. The project leader and coordinator will be the primary contact for communications for the DINAPI and the IDB. The key members of the team shall hold a bachelor’s degree in computer science and engineering, software engineering, system engineering, information technology, cyber security, public administration, IP law, or related disciplines. The consultant shall have at least 3 years of proven experience in IP information and administration system in system development, system design, system operation, and/or system maintenance.

6.3. Number of mission to Paraguay: 5

7. Project Schedule and Milestones

		Q1		Q2		Q3		Q4		Q5		Q6	
1	Inception Report												
2	System Implementation												
3	Submission of Manuals												
4	System operation and testing												
5	Internal training program												
6	Pilotization of documents												
7	Institutional capacity building												
8	Open Seminar												
9	System maintenance												
10	Project Completion Report												

8. Reporting Requirements

8.1. All contract communication, technical documentation and reporting on the project should be in English. User and operation manuals should be translated into Spanish. All translation and interpretation should be responsibility of the Consulting Firm at its own expense.

9. Acceptance Criteria

9.1. All submissions will be reviewed by the Team Leader and the DINAPI for approval. The Consulting Firm should address comments provided by the Team Leader and the DINAPI for correction and revision for the deliverable to be accepted.

9.2. The inception meeting will be held in Paraguay within the first month of signing the contract. The purpose of the inception meeting will be to identify the demands and requirements of the DINAPI for designing the IP digitization system and the paperless IP system. In addition, the consulting firm, DINAPI and the Bank will build consensus on the scope, schedule, and expected outputs of the project.

10. Supervision and Reporting

10.1. The consulting firm will be reporting to the Team Leader, Juan Pablo Ventura, Science, Technology and Innovation Sector Specialist of the Competitiveness, Technology and Innovation division (IFD/CTI) for supervision of the consultancy, submission of the deliverables and the approval in coordination with the DINAPI.

10.2. The Consulting Firm and the Team Leader will mutually agree upon the timeline and the deliverable due dates with the Bank and the DINAPI. It shall be Firm’s responsibility for ensuring that such meetings are conducted, and such reports are submitted to the Bank.

11. Schedule of Payments

11.1. Payment terms will be based on project milestones or deliverables. The Bank does not expect to make advance payments under consulting contracts unless a significant amount of travel is required.

Payment Schedule	
<i>Deliverable</i>	%
1. Inception report including the Work Plan & System Design	15%
2. System Implementation & acquisition of equipment	30%
3. System operation and testing & Internal training program	20%
4. Institutional capacity building & Pilot digitization of documents	15%
5. Open Seminar, System maintenance & Project Completion Report	20%
TOTAL	100%

Our culture: Working with us you will be surrounded by a diverse group of people who have years of experience in all types of development fields, including transportation, health, gender and diversity, communications and much more.

About us: At the Inter-American Development Bank, we’re devoted to improving lives. Since 1959, we’ve been a leading source of long-term financing for economic, social, and institutional development in Latin

America and the Caribbean. We do more than lending though. We partner with our 48-member countries to provide Latin America and the Caribbean with cutting-edge research about relevant development issues, policy advice to inform their decisions, and technical assistance to improve on the planning and execution of projects. For this, we need people who not only have the right skills, but also are passionate about improving lives.

Payment and Conditions: Compensation will be determined in accordance with Bank's policies and procedures. The Bank, pursuant to applicable policies, may contribute toward travel and moving expenses. In addition, candidates must be individuals from any IDB member country or non-IDB member countries recognized by the Donors of the Compete Caribbean Partnership Facility as eligible.

Visa and Work Permit: The Bank, pursuant to applicable policies, may submit a visa request to the applicable immigration authorities; however, the granting of the visa is at the discretion of the immigration authorities. Notwithstanding, it is the responsibility of the candidate to obtain the necessary visa or work permits required by the authorities of the country(ies) in which the services will be rendered to the Bank. If a candidate cannot obtain a visa or work permit to render services to the Bank the contractual offer will be rescinded

Consanguinity: Pursuant to applicable Bank policy, candidates with relatives (including the fourth degree of consanguinity and the second degree of affinity, including spouse) working for the IDB, IDB Invest, or MIF as staff members or Complementary Workforce contractuales, will not be eligible to provide services for the Bank.

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TERMS OF REFERENCE

Local Consultant for Project Implementation Support

PARAGUAY

PR-T1260

Enhancing Intellectual Property (IP) Management in Paraguay: IP digitization and implementation of paperless system

TERMS OF REFERENCE

Background:

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What you'll do: The principal objective of this consultancy is to support the DINAPI and the consulting firm with the project implementation through effective coordination.

- Provide technical, operational, organizational and administrative support with the DINAPI, the international consulting firm, and the IDB for the project implementation
- Liaise and support the coordination between the DINAPI, the international consulting firm, and the IDB to ensure effective and successful project implementation
- Maintain close communication with the stakeholders involved
- Attend meetings as required with the DINAPI, international consultant, and the IDB
- Participate in the missions of the international consultant to provide necessary technical support
- Provide timely assistance and support to the DINAPI, the international consultant and the IDB in all areas related to the project implementation
- Support organization and facilitation of the training, institutional capacity building program and the dissemination seminar
- Monitors the overall project progress and report to the IDB supervisor. Prepare monthly progress report including the project status and summarizing
- Perform other relevant tasks as required by the DINAPI, the international consulting firm, and the IDB

Deliverables: The consultant will be responsible for the delivery of the following products:

- Draft work plan within two weeks of contract signing with a monitoring and evaluation plan
- Draft progress report
- Final report

Payment timeline: Payment terms will be based on project milestones or deliverables.

Payment Schedule	
Deliverable	%
1. Submission and approval of Work Plan	30
2. Delivery and approval of Deliverable 2	30
3. Delivery and approval of Deliverable 3	40

Skills you'll need

- **Education:** University Degree in IT, computer science and engineering, IT, business administration, or related discipline; Advanced degree preferred.
- **Experience:** Minimum 7 years of working experience; Minimum 3 years of proven professional experience related to project management and IT. Solid technical knowledge of system design and engineering. Experience and understanding of project management procedures, project evaluation and IP system.
- **Languages:** Fluent in both English and Spanish
- **Areas of Expertise:** Computer, IP, IT
- **Skills:** Strong technical background in computer engineering and IT. Excellent analytical and problem-solving skills. Strong interpersonal and teamwork skills.

Opportunity Summary:

- Type of contract and modality: National Individual Consultancy, Product and External Services Contratual (PEC)
- Length of contract: 12 months
- Starting date: November 2018

- Location: Asuncion, Paraguay
- Responsible person: Juan Pablo Ventura (IFD/CTI), STI Specialist, jpventura@iadb.org

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Assessment of the background of the IP System in Paraguay Consultancy (IFD/CTI)

PARAGUAY

PR-T1260

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Background

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Consultancy objective(s)

This consultancy seeks to support the assessment of the IP system in Paraguay. The consultancy will coordinate the cooperative work between the Bank, Paraguay and Korean consultancy and to support the research and analytical work in IP management and e-government solutions. In particular, the consultancy

will (i)diagnose and assess the existing IP system in Paraguay; (ii)provide technical support for project implementation; (iii)contribute in active communication among the client institutions, writing insightful working papers regarding Korean STI policy/agencies especially in the area of IP management; (iv)support comparative research between LAC and Korea on STI related issues including IP management, in addition to carrying out different tasks as needed.

What you will do:

The selected candidate will:

- Review background documents on Intellectual Property Management of Paraguay
- Assess the existing IP system in Paraguay
- Analyze best practices to enhance the efficiency level of IP management and administration
- Facilitate the enhancement of Intellectual Property Management in Paraguay for IP digitization and implementation of paperless system.
- Compiling project data
- Facilitate a stakeholder workshop to validate the proposed design and obtain feedback for any necessary changes needed for the IP management system
- Support the capacity building program including the staff training for operation and maintenance of the newly established system and dissemination workshops for the public
- Identify potential opportunities for collaboration of projects and effectively coordinate the joint works and communication between Korea and the IDB in the fields where CTI is in charge.
- Contribute, under the supervision of the correspondent Specialist, to the preparation, implementation and supervision of projects covering the project planning, design, procurement, contract management, monitoring, operation, and implementation.
- Assist in developing information and databases for both the projects and papers under the responsibility of CTI to expand the knowledge base.
- Interact with team leaders and the client institutions in the effective formulation and implementation of the projects.

Deliverables:

The consultant will be responsible for the delivery of the following products:

- Work plan
- Analysis of the IP management system in Paraguay
- Best practices to enhance the public efficiency of IP management and administration
- review and stakeholder feedback to enhance the design of the IP management system in Paraguay
- Project final report

Payment timeline:

Payment Schedule	
Deliverable	%
1. Submission and approval of Work Plan	15%
2. Delivery and approval of deliverable 2	20%
3. Delivery and approval of deliverable 3	20%
4. Delivery and approval of deliverable 4	20%
5. Delivery and approval of deliverable 5	25%

Qualifications

- **Academic Degree/Level & Years of Professional Work Experience:** Required academic background includes advanced degree, at least Masters level, in STI policy, Development study, Engineering, Natural (Physical) science, Economics, Public administration, International Relations or related disciplines. Minimum 7 years proven practical experience in STI policy design and implementation and proven experience of working with MDBs and in LAC is required.
- **Languages:** Excellent command of English, Spanish and Korean.

- **Areas of Expertise:** STI policy, Engineering, Natural (Physical) science, International development, International Relations and Public policy.
- **Skills:** Strong quantitative and qualitative analytical skills; familiarity with IP system and the challenges facing the STI in Latin America and the Caribbean; experience working with business surveys and other micro data; ability to manage projects in developing countries; creativity and ability to work well in teams; ability to work independently; excellent writing and communication skills; demonstrate initiative and resourcefulness.

Characteristics of the Consultancy

- Consultancy category and modality: Individual, Product and services (PEC)
- Contract duration: 18 Months
- Place(s) of work: N/A
- Responsible person: Gustavo Atilio Crespi, Science and Technology Principal Specialist(IFD/CTI)

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