

Committee on Development and Intellectual Property (CDIP)

Thirty-Second Session
Geneva, April 29 to May 3, 2024

REVISED PROJECT ON SUSTAINING AND STRENGTHENING THE ROLE OF COLLECTIVE MARKS AS A TOOL FOR ECONOMIC, CULTURAL, AND SOCIAL DEVELOPMENT THROUGH A HOLISTIC DEVELOPMENTAL APPROACH – PROJECT PROPOSAL SUBMITTED BY THE PHILIPPINES, BRAZIL AND THE PLURINATIONAL STATE OF BOLIVIA

prepared by the Secretariat

1. During the thirty-second session of the Committee on Development and Intellectual Property (CDIP), the Committee considered a project proposal on “Sustaining and Strengthening the Role of Collective Marks as a Tool for Economic, Cultural, and Social Development through a Holistic Developmental Approach”, submitted by the Philippines, Brazil and the Plurinational State of Bolivia. Based upon the comments made during the discussion, the said project proposal was revised during the session.
2. The revised project proposal is contained in the Annex to this document.
3. *The Committee is invited to consider the Annex hereto.*

[Annex follows]

1. Introduction of the Project
1.1 Project Code
DA_1_4_10_02
1.2 Project Title
Sustaining and Strengthening the Role of Collective Marks as a Tool for Economic, Cultural, and Social Development through a Holistic Developmental Approach
1.3 DA Recommendations
<p><i>Recommendation 1:</i> WIPO technical assistance shall be, inter alia, development-oriented, demand-driven and transparent, taking into account the priorities and the special needs of developing countries, especially LDCs, as well as the different levels of development of Member States and activities should include time frames for completion. In this regard, design, delivery mechanisms and evaluation processes of technical assistance programs should be country specific.</p> <p><i>Recommendation 4:</i> Place particular emphasis on the needs of small and medium-sized enterprises (SMEs) and institutions dealing with scientific research and cultural industries and assist Member States, at their request, in setting up appropriate national strategies in the field of intellectual property.</p> <p><i>Recommendation 10:</i> To assist Member States to develop and improve national intellectual property institutional capacity through further development of infrastructure and other facilities with a view to making national intellectual property institutions more efficient and promote fair balance between intellectual property protection and the public interest. This technical assistance should also be extended to sub-regional and regional organizations dealing with intellectual property.</p>
1.4 Project Duration
24 months
1.5 Project Budget
The total Project budget is 320,000 Swiss Francs, all related to non-personnel expenditures.
2. Description of the Project
<p>The registration of collective marks has been recognized as one of the key contributors for economic, cultural, and social development of small and medium-sized enterprises (SMEs) and local communities. This has been evident, for example, in the recently completed Development Agenda (DA) project on the "Registration of the Collective Marks of Local Enterprises as a Cross-Cutting Economic Development Issue", which has been successfully implemented in the Philippines, Brazil, Tunisia, and the Plurinational State of Bolivia.</p> <p>The development of a systematic approach to collective marks, however, remains essential for the SMEs and local communities to benefit from and make use of this collective tool as well as to sustain the impact of such collective tool.</p> <p>In addition to assisting SMEs and local communities through programs aimed at sharing knowledge on branding and marketing, such a systematic approach should empower these</p>

SMEs and local communities to implement programs, initiatives, and internal policies aimed at identifying and addressing gaps in their current internal regulatory framework of use of the collective mark, ensuring compliance with this framework for, *inter alia*, preserving the core quality of their products, and effectively protecting and enforcing their IP rights. This, in turn, would enable them to develop and innovate their products further with a view to make the products domestically and globally competitive, which could help them achieve sustainability for their collective mark and for their economic development.

The objective of this project proposal is, therefore, to support and empower current and future collective marks holders from developing and least developed countries (LDCs) to maximize the full potential of and sustain their collective mark.

2.1 Project Concept

Collective marks have been recognized as a tool to enable SMEs and local communities to add value to their local products and compete locally and globally. Therefore, to ensure that the time, effort, and resources devoted to implementing previous DA projects related to collective marks, this project will specifically build on these DA projects, and focus on equipping SMEs and local communities with the necessary know-how, skills, capabilities and tools to effectively utilize and sustain the benefits derived from their collective mark, through the development of a holistic collective marks management framework.

As sustainability encompasses a wide spectrum of awareness-raising and capacity building activities, the holistic collective marks management framework would include tools to strengthen the capacity and knowledgebase of SMEs and local communities on:

(1) marketing, branding and commercialization; (2) achieving and maintaining financial sustainability; (3) identifying and addressing current gaps in their internal regulatory framework governing the use of the collective mark; (4) protecting and enforcing their IP rights; and (5) developing and innovating their products and regulations.

2.2 Project Objective, Outcome and Outputs

The overall **objective** of the project is to support and empower current and future collective marks holders from developing and least developed countries (LDCs) to maximize the full potential of and sustain their collective mark.

The project's intended **outcome** is better informed collective mark holders (current and future) in each beneficiary country to effectively use and sustain their collective mark.

The project will deliver a holistic collective marks management framework through the following **outputs**:

- i. Development, in cooperation with the relevant WIPO divisions, of a practical training program and related training material on the registration, management and use of collective marks.
- ii. Development of a practical toolkit/guide on the management and use of collective marks for SMEs and local communities, which would include model regulations of use, compliance requirements, internal governance mechanisms, quality control schemes, consumer protection, health and sanitation, as well as guidelines for drafting the regulations or identifying and addressing gaps in existing regulations.
- iii. Formulation of a business development strategy for collective marks holders (current and future) that would enable them to become more competitive in the domestic and global markets and thereby achieve sustainability for their collective mark and for their economic development.

2.3 Project Implementation Strategy

The proposed project will achieve its objectives through the following outputs:

Output 1 – A practical training program and related training material on the registration, management and use of collective marks.

Activities:

- (a) Carry out an assessment of the core elements related to the registration, management and use of collective marks to formulate the modules for the practical training program.
- (b) Engage relevant local government agencies and universities to develop the practical training program and related training material.
- (c) Organize a training for trainers on the practical training program and related training material for the staff of national IP Offices.

Output 2 – A practical toolkit/guide on the management and use of collective marks for SMEs and local communities, which would include model regulations of use, compliance requirements, internal governance mechanisms, quality control schemes, consumer protection, health and sanitation, as well as guidelines for drafting the regulations or identifying and addressing gaps in existing regulations.

Activities:

- (a) Collect good practices, models, and examples of existing regulations of use; identify essential gaps and ways to address these; hold consultations on the challenges in implementing the regulations to ensure the quality of the products and consumer protection, and related activities.
- (b) Identify and engage local experts/consultants to develop the practical toolkit/guide and to provide the necessary guidance and assistance to SMEs and local communities on the various aspects associated with the management and use of collective marks, which may include compliance with and addressing gaps in their internal regulatory framework, internal governance mechanisms, quality control schemes, consumer protection, health and sanitation, and IP enforcement. Upon proper vetting, these experts could potentially form part of a pool of specialized experts and be included in IP-ROC.

Output 3 – A business development strategy for collective marks holders (current and future) that would enable them to become more competitive in the domestic and global markets and thereby achieve sustainability for their collective mark and for their economic development.

Activities:

- (a) Map out and hold consultations on the challenges that SMEs and local communities encountered in the post-registration period of their collective mark, in terms of the branding, marketing, packaging and commercialization of their products and provide advice regarding marketing their products.
- (b) Research on appropriate business development strategies to further improve the products protected by the collective marks of SMEs and local communities.
- (c) Identify and engage local marketing and branding experts to formulate the business development strategy, and to provide the necessary guidance and assistance to SMEs and local communities, which may include proactive participation in trade fairs, events, or business rounds, use of digital marketing tools, guidance on market access, and fiscal management. Upon proper vetting, these experts could potentially form part of a pool of specialized experts and be included in IP-ROC.

2.4 Project Indicators	
<p style="text-align: center;"><u>Project outcome:</u></p> <p>Better informed collective mark holders (current and future) in each beneficiary country to effectively use and sustain their collective mark.</p>	<p style="text-align: center;"><u>Outcome indicator:</u></p> <p>At least ten collective marks holders of in each beneficiary country will use the project's outputs.</p>
<p style="text-align: center;"><u>Project outputs:</u></p> <p>A practical training program and related training material on the registration, management and use of collective marks.</p>	<p style="text-align: center;"><u>Output indicator:</u></p> <ul style="list-style-type: none"> - National IP Offices' staff trained and equipped to provide the practical training program to the SMEs and local communities, on demand or periodically. - The practical training program and related training material for SMEs and local communities implemented by national IP Offices in the beneficiary countries.
<p>A practical toolkit/guide on the management and use of collective marks for SMEs and local communities, which would include model regulations of use, compliance requirements, internal governance mechanisms, quality control schemes, consumer protection, health and sanitation, as well as guidelines for drafting the regulations or identifying and addressing gaps in existing regulations.</p>	<p>The practical toolkit/guide, translated in local languages, disseminated to SMEs and local communities, through the national IP Offices.</p>
<p>A business development strategy for collective marks holders (current and future) that would enable them to become more competitive in the domestic and global markets and thereby achieve sustainability for their collective mark and for their economic development.</p>	<p>The business development strategy formulated, translated in the local language and disseminated to SMEs and local communities, through the national IP Offices.</p>
2.5 Sustainability Strategy	
<p>To ensure sustainability of the project outputs, a dedicated webpage will be maintained by WIPO, offering easy access to all material delivered under this project.</p> <p>A network of experts, consisting of national focal points, representatives of different institutions, amongst others, will be created to share experiences on project implementation and to provide mentoring on the specific subject matter.</p> <p>Updates to the sustainability strategy will be provided in the course of the project implementation.</p>	
2.6 Selection Criteria for Pilot/Beneficiary Countries	
<p>Member States who have been the beneficiary of a collective-mark-related DA project.</p>	

2.7 Implementing Organizational Entity

Development Agenda Cooperation Division (DACD), Regional and National Development Sector (RNDS)

2.8 Links to other Organizational Entities

Regional and National Development Sector; Brands and Designs Sector; IP and Innovation Ecosystems Sector; Global Challenges and Partnerships Sector.

2.9 Links to other DA Projects

DA Project on *IP and Product Branding for Business Development in Developing Countries and Least Developed Countries (LDCs)* ([CDIP/5/5](#))

DA Project on *Registration of the Collective Marks of Local Enterprises as a Cross-Cutting Economic Development Issue* ([CDIP/24/9](#))

DA Project on *Empowering small businesses through IP: developing strategies for supporting geographical indications or collective marks in the post-registration period* ([CDIP/27/7](#))

2.10 Contribution to Expected Results in WIPO's Program and Budget

Program and Budget 2024/25

1.1 More effective communication and engagement worldwide to raise awareness of and increase knowledge about the potential of IP to improve the lives of everyone, everywhere.

4.1 More effective use of IP to support growth and development of all Member States and their relevant regions and sub-regions, including through the mainstreaming of the Development Agenda Recommendations.

4.2 Development of balanced and effective IP, innovation and creative ecosystems in Member States.

4.4 More innovators, creators, SMEs, universities, research institutions and communities leverage IP successfully.

2.11 Risk and Mitigation

Risk 1: Limited stakeholder engagement.

Mitigation 1: A comprehensive engagement plan will be developed.

Risk 2: Limited local experts specialized in the business development aspects of collective marks management.

Mitigation 2: Engage specialized experts at the international level to provide the necessary training, guidance and assistance.

3.TENTATIVE IMPLEMENTATION TIMELINE

Project Deliverables	Quarters							
	Year 1				Year 2			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Pre implementation activities: ¹ - Consultation with national and regional coordinators								
A practical training program and related training material on the registration, management and use of collective marks	X	X	X	X				
Trainings for trainers on the practical training program and related training material for national IP Offices' staff				X				
A practical toolkit/guide on the management and use of collective marks for SMEs and local communities			X	X	X	X		
Workshops on the practical toolkit/guide for SMEs and local communities						X		
A business development strategy for collective marks holders (current and future)					X	X	X	
Workshops on the business development strategy for SMEs and local communities							X	
Project evaluation								X
CDIP side event								X

¹Implementation will start only once the pre-implementation activities have been delivered.

4. PROJECT BUDGET BY OUTPUT

<i>(in Swiss francs)</i> Project Outputs	Year 1		Year 2		Total
	Personnel	Non-Personnel	Personnel	Non-Personnel	
A practical training program and related training material on the registration, management and use of collective marks	-	40,000	-	-	40,000
Trainings for trainers on the practical training program and related training material for national IP Offices' staff	-	60,000	-	-	60,000
A practical toolkit/guide on the management and use of collective marks for SMEs and local communities	-	40,000	-	-	40,000
Workshops on the practical toolkit/guide for SMEs and local communities	-	-	-	60,000	60,000
A business development strategy for collective marks holders (current and future)	-	-	-	30,000	30,000
Workshops on the business development strategy for SMEs and local communities	-	-	-	60,000	60,000
Project evaluation	-	-	-	15,000	15,000
CDIP side event	-	-	-	15,000	15,000
Total	-	140,000	-	180,000	320,000

5. PROJECT BUDGET BY COST CATEGORY

<i>(in Swiss francs)</i>	Travel, Training and Grants			Contractual Services				Total
	Staff Missions	Third-party Travel	Training and related travel grants	Conferences	Publishing	Individual Contractual Services	Other Contractual Services	
Activities								
A practical training program and related training material on the registration, management and use of collective marks	-	-	-	-	6,000	34,000	-	40,000
Trainings for trainers on the practical training program and related training material for national IP Offices' staff	20,000	20,000	20,000	-	-	-	-	60,000
A practical toolkit/guide on the management and use of collective marks for SMEs and local communities	-	-	-	-	6,000	34,000	-	40,000
Workshops on the practical toolkit/guide for SMEs and local communities	20,000	20,000	20,000	-	-	-	-	60,000
A business development strategy for collective marks holders (current and future)	-	-	-	-	6,000	24,000	-	30,000
Workshops on the business development strategy for SMEs and local communities	20,000	20,000	20,000	-	-	-	-	60,000
Project evaluation	-	-	-	-	-	15,000	-	15,000
CDIP side event	-	-	-	15,000	-	-	-	15,000
Total	60,000	60,000	60,000	15,000	18,000	107,000	-	320,000

[End of annex and of document]