Terms of Reference (ToR)

Ghana Creative Economy Diagnostic & Investment Planning

1. Context & Rationale

Ghana's creative economy is dynamic, youthful, and diverse spanning film, music, fashion, design, digital content, cultural heritage, and more. Despite its vibrancy, the sector faces persistent challenges: fragmentation, limited and inconsistent data, uneven access to finance, and underdeveloped regulatory and institutional support.

This ToR sets out an ecosystem-wide diagnostic and investment blueprint to address these challenges and position Ghana's creative economy as a driver of inclusive growth, quality jobs, and export competitiveness.

The assignment will generate robust evidence, shape reform priorities, and develop an investment pipeline, enabling the Ministry of Tourism, Culture and Creative Arts (MoTCCA) to launch a medium-to-long-term program that converts evidence into policy reform, investment attraction, job creation, and export growth. It aims:

1. Generate high-quality data to fill evidence gaps and benchmark Ghana's creative economy against global and regional peers.
2. Shape policy and regulatory reforms that lower business costs, reduce fragmentation, and strengthen the investment climate.
3. Package investment opportunities into bankable project concepts for inclusion in the national budget process, donor pipelines, and private capital markets.

Guiding Principles

- Whole-of-ecosystem approach: covering policy, infrastructure, skills, finance, and intellectual property.
- Evidence-based prioritization: subsectors selected using transparent, data-rich, benchmarked criteria.
- Co-creation: broad stakeholder consultations across industry and regions for design and validation.
- Investment readiness: outputs aligned to government, donor, and investor requirements.
- Inclusive growth: gender equity, youth engagement, minority participation, and balanced regional development embedded at every stage.

Key Deliverable Milestones

To ensure transparency, progress tracking, and decision-readiness, each phase will produce a major report or validated deliverable:

- **Phase 1**: *Inception Report & Methodology Note*.
- **Phase 2**: *Whole-of-Ecosystem Diagnostic Report*.

- **Phase 3 –** *Prioritization Report* (Top 5 industries with scoring matrix) and *Industry Deep Dive Reports* (Film + 2 others).
- **Phase 4 –** *Investment Concept Notes* (*at least* x3), *Upgrade Options Matrix*, and *Policy Note*.

These deliverables will act as the core evidence base for policy formulation, resource mobilization, and targeted investment in Ghana's creative economy.

2. Objectives & Success Metrics

The objective of this assignment is to generate a robust evidence base, strategic insights, and an actionable investment pipeline to reposition Ghana's creative economy as a key driver of inclusive growth, employment, and export competitiveness. The work is designed to unfold in four interconnected phases, with each phase deepening the analytical focus and preparing the ground for concrete reform and investment actions.

Specifically, the assignment will:

1. **Map the Landscape and Diagnose Constraints:** Define Ghana's creative economy by identifying key sectors, actors, support systems, and clusters. Compile baseline data on sector size, jobs, infrastructure, and institutions, with emphasis on youth and women. Diagnose economy-wide market, regulatory, and financing barriers. Pilot Film industry geospatial mapping through a GIS dashboard.
2. **Prioritize Five High-Potential Creative Industries:** Apply a structured scoring framework to objectively assess and rank creative industries based on economic contribution, job potential, market reach, innovation, infrastructure readiness, and inclusion. Film is pre-selected; four others will be identified through data analysis and targeted stakeholder input.
3. **Conduct Deep Dives into Three Creative Industries:** Analyze Film and two other prioritized industries in detail, covering value chains, market dynamics, infrastructure, monetization models, IP, skills, and inclusion. Identify industry-specific reform levers and investment drivers. Produce cross-industry synthesis highlighting systemic opportunities and constraints.
4. **Design Investment & Upgrade Options:** Turn deep dive and cross-industry findings into three investment concept notes, with each deep dive generating at least one upgrade option and, where justified, an additional concept note. Include CAPEX/OPEX estimates, financing models, projected outcomes, and an Upgrade Options Matrix comparing standalone and integrated approaches. Prepare a Cabinet-ready investment and reform package for government and partners.

Success Metrics

- Coverage: Baseline data compiled for ≥12 creative industries; Film assets mapped with ≥80% coverage of known value chain actors: acting schools, studios/exhibition venues, sound recording, videography suppliers, editing houses, etc.
- Engagement: broad stakeholder consultations; 4 validation workshops (one per deep dive industry and one for the creative economy in general.
- Prioritization quality: Published scoring matrix, reproducible dataset, and rationale notes for Top 5.

- Investments: 3 concept notes each with CAPEX/OPEX, demand model, funding pathway, and job creation per GH₵100k estimate.
- Policy: Scorecard + Policy Note with ≥10 prioritized reforms, each with owner and time horizon for achievement (0-6m vs 6-24m action).
- Readiness: Cabinet-ready slide deck accepted by MoTCCA for presentation to cabinet.

3. Methodology and Phasing

The assignment will be implemented through four sequential and interrelated phases. Each phase includes a set of technical activities and clearly defined outputs, combining global CE diagnostic frameworks with context-specific operational methods. The methodology will apply international standards (e.g., UNCTAD, WIPO, UNESCO), World Bank tools (e.g., 4Cs framework, CE policy stocktaking, CE Diagnostic Guidance Note), and data-driven techniques (e.g., platform analytics, GIS visualization), tailored to Ghana's policy, institutional, and market landscape. Each phase builds directly on the outputs of the previous, ensuring analytical continuity and avoiding duplication.

Phase 1: Inception and Methodology Design

Purpose: To establish the analytical foundation for the assignment by finalizing definitions, diagnostic frameworks, tools, and operational plans, and aligning stakeholders on the scope and approach.

Activities

- Conduct a desk review of relevant CE policies, studies, and stakeholder mappings in Ghana.
- Develop a context-adapted definition of Ghana's creative economy using global frameworks (UNCTAD, WIPO, World Bank CE note).
- Design the methodology for whole-of-economy mapping, combining desk research, ecosystem interviews, digital platform data, and institutional engagement. This will include the method for estimating the Creative Economy's contribution to Ghana's GDP and employment, with these contributions broken down by the top 12 creative industries. Consultants may use labor force survey data, household survey data and/or other secondary datasets and modeling.
- Finalize the industry classification list and identify potential overlaps with related sectors such as tourism and the digital economy.
- Adapt and refine a scoring framework to objectively assess and prioritize the top five creative industries (see Phase 3A) and pre-test it using Film as a calibration case.
- Map stakeholders across ministries, agencies, creative guilds, platforms, development partners, and support institutions.
- Confirm the approach for piloting geospatial analysis with Film, defining key data layers, metadata standards, and data governance protocols.
- Facilitate an inception meeting with MoTCCA to validate objectives, methodology, workplan, team roles, timelines, and data request templates.

Outputs

- Inception Report and Methodology Note containing the final diagnostic framework, industry classification, stakeholder map, scoring matrix, and Film GIS pilot plan.
- Validated workplan and timelines including agreed team roles, milestones, and data request schedule.
- Stakeholder engagement and data collection protocols detailing approach, tools, and governance measures.

Phase 2: Whole-of-Ecosystem Diagnostic of Ghana's Creative Economy

Purpose: Establish a national baseline of Ghana's creative economy by mapping industries, institutional actors, demand flows, and infrastructure. Apply the World Bank's 4Cs framework – human, financial, intangible, and policy capital – to diagnose opportunities and constraints, producing the evidence base that will guide sector prioritization and shape investment planning in later phases.

Activities

- Map Ghana's creative industries at the cluster/hub level, identifying key public, non-profit, and private institutions, production facilities and major enterprises. Pilot a Film GIS dashboard to visualize assets, infrastructure, and demand clusters for potential scale-up.
- Analyze demand trends using digital platform data (e.g., YouTube, Spotify, event ticketing – subject to data availability) to estimate both national and diaspora-driven markets for creative content and services. Identify markets of untapped demand (ie export markets for creative goods, demand for digital creative content, etc) and regulatory, legal, infrastructure and skills barriers to reaching these markets
- Benchmark Ghana's creative economy against selected African peers on sector size, digital presence, institutional arrangements, and policy support, highlighting relative strengths and gaps. Use the benchmarking to ascertain industries and sectors of comparative advantage and to produce case study boxes to be used in the deliverable reports.
- Apply the World Bank's 4Cs framework to assess human, financial, intangible, and policy capital, identifying key skills gaps, financing barriers, IP challenges, and regulatory weaknesses. Supply-side factors assessed should include but are not limited to legal and regulatory environment, policy issues, human capital and skills, data and statistics, entrepreneurship and firm-level factors, infrastructure, access to finance (including demand and supply side barriers, suitable financing instruments), intellectual property, political economy, standards and export processes. There should be a specific focus on financing and access to finance issues. The legal and regulatory review could include areas such as intellectual property law, content and culture policy, and cross-border payment as relevant to Ghana
- Map regulatory and operational pathways for creative firms (e.g., licensing a concert, exporting fashion, monetizing online content) and integrate results from a short entrepreneur survey to quantify compliance costs, procedural complexity, and financing constraints.
- Compile an "opportunities and constraints" matrix that synthesizes mapping, demand analysis, benchmarking, and 4Cs findings to form the evidence base for Phase 3 prioritization.

Outputs

- Diagnostic Report of Ghana's Creative Economy: Opportunities and Constraints, estimated economic impact (GDP and jobs overall and by industry), integrating mapping, demand, benchmarking, 4Cs, and regulatory/survey insights.
- Digital Infrastructure & Ecosystem Map with Film GIS dashboard prototype for potential scale-up.
- Regulatory Scorecard & Business Journey Chart incorporating cost-to-comply survey findings.
- Digital Demand Index & Peer Benchmarking Brief summarizing market trends and Ghana's regional position. Identification of key opportunities for market-level growth and CE innovation

Phase 3: Prioritization and Deep Dives into Ghana's Creative Industries

Purpose: Translate the diagnostic findings from Phase 2 into deeper sectoral insights by identifying five priority creative industries and conducting focused deep dives into three of them including Film. This phase is divided into two parts:

- 3A: Prioritization of Five Creative Industries
- 3B: Deep Dives into Three Creative Industries

The deep dives will be directly informed by the results of prioritization, ensuring analytical continuity and strategic focus.

3A: Prioritization of Five Creative Industries

Purpose: Identify the five most promising creative industries in Ghana using the refined and adapted scoring framework below. This will be based on a longlist of creative industries and supported by targeted diagnostics, stakeholder validation, and industry-level profiling. Film is pre-selected, and the process will determine four additional industries.

Scoring Criteria (100 Points):
Adapt and refine scoring framework (below) to objectively evaluate creative industries across a consistent set of dimensions.

Criteria	Score (%)	Description
Economic Performance	30%	Sector growth, contribution to GDP/exports, enterprise productivity
Creative Density & Jobs	20%	Creative worker population, MSME presence, employment scalability
Market Demand & Reach	15%	Consumer and diaspora demand, platform visibility, monetization potential
Infrastructure & Ecosystem Readiness	10%	Hubs, support systems, education/training availability
Scalability & Innovation	10%	Potential to scale regionally and support new formats, platforms, or IP
Inclusion & Informality Uplift	10%	Youth and gender participation, informality reduction

Tourism/Cultural Linkage Bonus	5%	Synergy with destination development and tourism strategies

Activities

- Conduct rapid diagnostics for a longlist of up to 12 creative industries using Phase 2 data and targeted consultations.
- Prepare concise 1–3 page mini-diagnostics for each of the 12 industries, covering market size, employment potential, enterprise density, informality, monetization, infrastructure readiness, regulatory environment, inclusivity, and links to tourism and diaspora markets.
- Apply the scoring framework across the 12 industries, confirming weightings and criteria functionality.
- Select the top five priority industries, including Film, based on scoring results and investment-readiness considerations, and document the rationale.
- Facilitate a stakeholder validation session with MoTCCA and industry representatives to confirm the final shortlist.
- Finalize one-page briefs for the five priority industries to guide Phase 3B deep dives.

Outputs

- Mini-Diagnostics Portfolio: 12 creative industries (1–3 pages each)
- Prioritization Report with scoring matrix, methodology and rationale
- Validated shortlist of top five creative industries (including Film)
- One-page final briefs for each priority industry

The mini-diagnostics and one-page briefs from Phase 3A will serve as baseline chapters for Phase 3B deep-dive reports, ensuring sector-specific analysis builds on verified prioritization.

Phase 3B: Deep Dives into Three Creative Industries (Including Film)

Purpose: Conduct targeted value chain diagnostics of **three priority creative industries**, including **Film** to uncover growth levers, binding constraints, and strategic upgrade options. The analysis will apply a **value chain lens** as the primary framework, with all findings linked to creation-to-monetization stages and sectoral linkages. The outputs will feed directly into the design of actionable investment and reform concepts in Phase 4.

Activities

- Apply a full value chain lens to each selected industry, covering creation, production, distribution, and monetization stages, and mapping formal and informal actors, institutional support, input-output relationships, and linkages to adjacent sectors.
- Identify growth barriers and opportunities, focusing on skills, infrastructure, finance, intellectual property, and market access, and estimate potential impacts such as job creation, revenue growth, and market expansion.

- For Film, expand the GIS dashboard to analyze spatial dynamics of production, exhibition, training, and consumption hubs, and prepare a scalability plan with documented metadata standards for adaptation to other industries.

- Engage MoTCCA and industry stakeholders (preferably virtual or in-person) to present deep dive finding, validate insights and co-develop preliminary upgrade options.

- Propose upgrade options categorized as soft (legal, institutional, policy, regulation, capacity) and hard (infrastructure, equipment, capital), with indicative costs, potential financing pathways, and expected economic and employment impacts.

Outputs

- Industry Deep Dive Reports (x3) for the three priority industries (incl. Film), following the standardized reporting structure in Annex 1, each anchored in the value chain framework and featuring a standardized visual value chain map.

- GIS-enabled Film industry visualization with scalability plan for other industries.

- Upgrade Options Matrix outlining soft and hard levers, indicative costs, financing pathways, and projected impacts.

- Recommendations on realistic actions Ghana can undertake reduce market and government failures and increase the impact of its CE in the areas of:

    - Legal and regulatory reforms, policy issues, human capital and skills, the CE entrepreneurship ecosystem, intellectual property, infrastructure, access to finance (and financial instruments/interventions required), institutional mechanisms, export markets, data and statistics and political economy

    - Identify specific interventions to support women and youth

    - Identify MSME financing and support instruments based on the diagnostic, which may include , but not be limited to cash-flow based financing, risk financing and financial instruments such as credit guarantee programs, CE funds, matching grants, incubation programs. This section should provide the rationale behind the recommended instruments and outline the parameters for implementation

- Stakeholder Validation Summary capturing feedback and refinements from consultations.

- Industry-specific presentation decks summarizing findings, validated upgrade options, and impact estimates.

Phase 4: Design Investment and Upgrade Option

Purpose: Translate diagnostics from the three deep dive creative industries (from Phase 3B) into a pipeline of investment-ready opportunities, upgrade options and reform measures. These may include multi-industry complexes such as the proposed **Film and Creative Village**, which combines production, post-production, retail, and visitor infrastructure, or stand-alone upgrades where targeted interventions can unlock high value. The focus will be on interventions that are financially viable, scalable, and capable of delivering measurable impact in Ghana’s creative economy.

Activities

- Synthesize findings from the deep dives to identify scalable opportunities for infrastructure, institutional, and service-level upgrades.

- Apply a prioritization filter for investment selection using metrics such as jobs per GH₵100k, bankability, monetization potential (local and export), ease of execution, and long-term financial sustainability.

- Co-develop three investment concept notes (including Film and two others from Phase 3B) – with each deep dive producing at least one upgrade option and, where justified, a second concept note – as either stand-alone projects or clustered into a multi-industry complex, detailing CAPEX/OPEX requirements, revenue models, demand forecasts, partnership structures, and indicative financing pathways.

- Conduct an additional technical, financial, and political risk assessment for any large-scale infrastructure or multi-industry complex proposals, examining long-term sustainability, stakeholder alignment, vulnerability to policy or political changes, and options for phased implementation to reduce risk.

- Construct an Upgrade Options Matrix comparing projects by cost, impact potential, financing suitability, and implementation complexity.

- Extract and package policy reforms from earlier phases into Quick Wins (0–6 m) and Medium-Term (6–24 m), aligned with responsible agencies and investment-readiness needs.

- Visualize creator and user experiences through Touchpoint Heat Maps to highlight priority upgrade needs and commercial hotspots.

- Engage MoTCCA and key stakeholders (in-person or virtual option) to test design assumptions, validate proposed project viability, and confirm implementation readiness.

- Package investment concept notes, Upgrade Options Matrix, and supporting visuals into decision-ready formats for consideration by government, development partners, and private investors.

Outputs

- Three investment concept notes (Film plus two other industries), with each deep dive producing at least one upgrade option and, where justified, a second concept note, each including CAPEX/OPEX models, revenue projections, demand forecasts, financing pathways, and partnership options.

- Upgrade Options Matrix comparing cost, impact potential, financing suitability, and implementation complexity.

- Touchpoint Heat Maps illustrating creator and user experience and highlighting upgrade priorities.

- Policy Note – Quick Wins (0–6 m) and Medium-Term Reforms (6–24 m), based on evidence from Phases 2–3B and validated with MoTCCA.

- Decision-ready investment package for high-level presentation to Cabinet, development partners, and potential investors.

4. Timeline (15 Weeks)

Weeks	Outputs
1–2	Inception Report and Methodology Note (final diagnostic framework, industry classification, stakeholder map, scoring matrix, Film GIS pilot plan); validated workplan and timelines; stakeholder engagement and data collection protocols; data request pack.
3–5	Data inventory and mapping schema; peer benchmarking pack; survey dashboard draft; regulatory journey templates.
6–7	Diagnostic Report v1 (Opportunities and Constraints); CE Regulatory Scorecard v1 (with cost-to-comply findings); Film GIS prototype v1; Digital Infrastructure and Ecosystem Map draft.
8–9	Mini-Diagnostics Portfolio (12 industries); scoring matrix v1; Prioritization Report v1; one-page briefs for top five industries.
10–11	Deep-dive drafts for Film and Priority Industry (2); Film GIS v2 with scalability plan; initial Upgrade Options Matrix; preliminary cross-industry findings.
12	Deep-dive draft for Priority Industry 3; refined cross-industry findings; Upgrade Options Matrix v1.
13–14	Three draft investment concept notes (Film plus two other industries); Upgrade Options Matrix v2; Policy Note v1 (Quick Wins and Medium-Term Reforms).
15	Cabinet-ready investment and reform presentation deck; final Diagnostic Report; final Prioritization Report; three final investment concept notes; final Policy Note; final Film GIS prototype with scale-up roadmap; data handover pack.

5. Firm Qualifications

The firm (or consortium) must show:

- **Creative economy depth:** At least 2 recent projects on creative industries diagnostics, value chains, digital economy, tourism or investment planning in Africa since 2019.
- **Policy and IP capability:** Proven work on regulatory reviews, IP, business licensing, and public administration reform.
- **Investment design:** Experience turning diagnostics into bankable/investment concept notes with CAPEX/OPEX, demand, ROI, and partnership structures.
- **Data and Analytics:** In-house capacity to build a GIS/Power BI prototype, manage datasets, and produce dashboards and infographics.
- **Research methods:** Mixed-methods design for surveys, interviews, and platform analytics. Ethical data collection and data protection.

- **Ghana presence:** A Ghana-based partner or office with demonstrated delivery for government. Knowledge of MoTCCA and related agencies and the local creative economy ecosystem and market.

- **Quality Assurance and Data Governance:** Documented QA system compliant with ISO 9001 or equivalent, and written procedures aligned with Ghana's Data Protection Act (2012).

Consortia are allowed. The lead firm is accountable for delivery and coordination.

6. Team Composition (Key Experts)

The Consultant will field a lean, multi-disciplinary team for the full 15-week assignment, with flexibility to mobilize short-term specialists (e.g., gender & inclusion, diaspora market analysis, visualization, survey coordination) as needed.

- **Team Leader / Creative Economy Specialist**
  - Leads all phases, ensures technical coherence, quality assurance, and stakeholder facilitation.
  - Master's in Economics/Creative Industries/Tourism/Development Studies; 12+ years' experience; ≥ 3 multi-sector CE projects in SSA; ≥ 2 government–donor–private facilitation assignments.

- **Regulatory & IP Policy Expert**
  - Develops CE Regulatory Scorecard, maps business journeys, runs Cost-to-Comply survey, benchmarks peer countries, prepares Policy Note.
  - LLM/MPA; 10+ years' experience; ≥ 3 business-environment or IP reform projects; SSA creative economy/media/ICT experience.

- **Industry Leads (3) – Film and Two Priority Industries**
  - Conduct deep dives, value-chain mapping, constraints analysis, and upgrade options; Film Lead also directs Film GIS upgrade.
  - Master's+ in CE, Econ, Film, Business, Tourism or related; 7–8+ years' sector experience.

- **Investment & Financial Modelling Expert**
  - Designs investment selection filter; prepares CAPEX/OPEX models; calculates jobs per GH₵100k; demand forecasts; financing structures.
  - MSc in Finance/Economics; CFA or equivalent preferred; 8+ years' experience; ≥ 2 CE/creative infrastructure investments to financing stage.

- **GIS & Data Visualization Specialist**
  - Builds Film GIS prototype; prepares metadata & data dictionary; develops scale-up roadmap.
  - MSc in Data Science/GIS/Statistics; 5+ years' experience; ≥ 3 platform/telco data dashboard projects.

- **Research & Survey Lead**
  - Designs and runs rapid survey & interview programme; ensures data quality; conducts analytics.
  - Master's in Econ/Stats/Social Research; 5+ years' experience; ≥ 2 CE/cultural surveys.

Non-key support (as needed): *Data analyst, enumerators, designer, local facilitators, etc.*

Annex 1 – Deep Dive Reporting Structure: Example for Film CI

The value chain framework will serve as the primary analytical lens, with all sections drawing on creation-to-monetization stages and linkages to identify constraints, opportunities, and investment priorities. Each deep dive will include a standardized visual value chain map for comparability across industries.

Section	**Key Focus**
1. Executive Summary	Key findings, priority actions, and headline figures (market size, jobs, CAPEX), etc.
2. Industry Overview	Definition, scope, evolution, and key trends.
3. Market Size & Demand	Revenues, audience trends, diaspora/export demand, consumption patterns, etc.
4. Employment & Skills	Jobs, skills gaps, training ecosystem, inclusion indicators.
5. Value Chain Mapping	Creation-to-monetization flow, key actors, linkages. Include standardized visual map showing stages, bottlenecks, and upgrade points.
6. Financing & Investment	Funding sources, investor appetite, gaps, ROI, blended finance potential, etc.
7. Infrastructure & Technology	Physical/digital assets, technology adoption, facility quality, etc.
8. Regulatory Environment	Laws, licensing, IP protection, compliance costs, gaps, etc.
9. Inclusion & Representation	Gender/youth participation, barriers, informality reduction.
10. Tourism & Diaspora Links	Diaspora engagement, tourism synergies, partnerships, etc.
11. Challenges	Core constraints in policy, finance, skills, infrastructure, markets.
12. Investment Opportunities	Bankable projects with CAPEX/OPEX, ROI, jobs per GH₵100k, readiness, and strategy alignment.
13. Beyond Investment Opps	Trends, innovations, and synergies to monitor, etc.
14. Recommendations	Actionable policy, funding, training, inclusion, and partnership measures linked to upgrades.