



Open call for the selection of one IP and Innovation expert to undertake the design and delivery of a 5-day training for university managers and executives on innovation and IP strategies within the Lebanon Innovate EU-funded project.

Terms of Reference

Project Title	Lebanon Innovate (Reference: NDICI-GEO-NEAR/2022/435-765-PC 18220)
Financing	European Union
Contracting organisation	The European Business Innovation Centre Network (EBN)
Experts to be selected	Expert to undertake the design and delivery of a 5-day training for university managers and executives on innovation and IP strategies

1. Background

Lebanon Innovate is a 42-month program funded by the European Union, which aims to foster an enabling knowledge transfer and IP ecosystem in Lebanon and transform research and innovations emerging from universities and research centers into commercial ventures. Ultimately, the program seeks to contribute to sustainable and inclusive socio-economic growth.

To achieve this goal, the project aims to meet the following needs at a national level:

- **Foster an enabling environment to boost innovation and capacitate stakeholders**, especially in creating and sharing knowledge and commercializing technologies.
- **Strengthen cooperation between industry and academia** to promote innovation and knowledge transfer and support the commercialization of products.

Capacity-building initiatives will reinforce knowledge management in academia and industry, promoting policies and skilled talents to develop, protect and commercialize IP innovations.

Innovation management is today recognized as a key component of both academic and industry strategic thinking and management efforts. As such, universities and research centers need to be able to facilitate the translation of research results into new services, technologies and new business models designed for a changing (global) society. To better enable this transfer of knowledge to the market, universities and research centers need to establish clear innovation management plans and integrate them into their wider organizational strategies.



As emerged from [the NEXT SOCIETY Innovation Roadmap](#), the Lebanese ecosystem is challenged by the lack of funding for applied research, lack of Intellectual Property (IP) policies and support as well as weak links between academic research and industrial needs.

There is still bigger impact Lebanese universities and research centers can unlock by encouraging and supporting the potential of researchers to drive economic prosperity and solve current challenges through sound innovation strategies and IP policies.

Therefore, the Lebanon Innovate project aims at promoting and fostering a culture and a mindset of innovation within Lebanese universities and research centers, focusing on strategies for effectively commercializing research and IP assets.

As demonstrated by the mapping of Lebanese universities and research centers the project is currently performing, many universities recognize the importance of protecting and commercializing IP, but only a few of them have already clear IP policies and TTOs in place.

In this framework, the upcoming training for university managers and executives on innovation and IP strategies aims to contribute to further developing the IP and technology transfer landscape in Lebanon and encourage the development of research that addresses market and societal needs turning them into commercial startups or connecting them with industrialists.

2. Objective

EBN seeks an external Expert to carry out the design and implementation of the *Lebanon Innovate Train of Trainers for university managers and executives on innovation and IP strategies* foreseen in October 2023.

The training will contribute to Lebanon Innovate's specific objective of creating systemic and sustainable changes in the ecosystem through the **empowerment of different innovation actors and the enhancement of R&D products via technology transfer (TT) and IP valorization**.

The training aims to build and increase the **knowledge, skills and capacities** of the Lebanese university and research center managers and executives on **Innovation, Intellectual Property, and commercialization of research**, allowing them to elaborate and implement proper IP strategies and commercialization roadmap within their universities **for full (incl. economic) exploitation of the research findings**.

3. Activity description

Objective: The activity, coordinated by EBN with the implementation support of Berytech, aims to **develop appropriate IP skills in universities/research structures for full (incl. economic) exploitation of the research findings**.



Activity description: The activity consists of **40h of training for executives/deans/university managers**, following a feasible schedule for their duties. The training is complemented by group coaching sessions led by Berytech over 90 days after the training program completion which will assess progress and provide guidance on specific issues or problems (Lebanon Innovate in 2024 will also offer dedicated support to 8 universities to help them establish their IP policies, and 8 universities to establish or enhance their TTOs).

Output: at least **40 senior executives** from universities/research centers updated or reskilled in IP management strategies and related enhancement for industrial and commercial purposes.

Location and Time: The training will take place in Beirut, Lebanon, during the **second half of October 2023, most likely from 23-27th of October 2023.**

About the training: Lebanon Innovate organizes a 5-day training dedicated to University Managers and Executives on Innovation and IP Strategies.

This training course will go through processes, organizational frameworks, and tools to let Lebanese universities and research centers build/enhance their strategic framework for the management of innovation and IP.

The training is addressed to the following profiles within universities and research institutions:

- **University top managers** (including associate provost for R&I, deans of faculties, and department chairs) **and executives of research centers** that play a pivotal role as institutional visionaries and decision-makers. For them, the training course is particularly meant to address the strategic relevance of innovation and IP management within the wider institutional strategy. The objective is to enable cultural change within universities and research centers, emphasizing the role innovation can play in these institutions.
- **Faculty members** (including researchers, project leads and innovators) **and technology transfer managers** that can act as *innovation champions* within universities and research institutions, with relevant background, experience, and interest in commercializing research results: these profiles are deemed fundamental to making this cultural change happen. For them, the training should focus on how they can identify research opportunities inside the university; how to synergize between researchers of different departments; how results of R&D projects can be assessed and evaluated to finally bring value to the market economically and socially. We expect these profiles to be the ones who will implement innovation and IP strategies in the university.

In particular, the following aspects have been identified as relevant for the training and must be included in the training curriculum (non-exhaustive list):



Intellectual Property

- Intellectual properties basics
- IP management & strategy (including the role of commercialization in universities, structure, framework and strategic planning for commercialization, legal aspects such as licensing and agreements)

Technology Transfer

- Fundamentals of TTO
- TTO role, structure and operation
- Marketing and outreach strategies to promote TTO services (including legal aspects)

Innovation

- Start-up and Entrepreneurship (including entrepreneurship promotion and support programs and organizations, like incubators, accelerators, innovation hubs)
- Innovation assessment and evaluation
- Market research & validation of innovations
- Commercialization of innovations

Ethical considerations in innovation

Theoretical frameworks, practical methods and tools, and case studies must be introduced in each module.

4. Scope of work

In this framework, the Expert will undertake the following activities:

- Design a 40-hour training program on Innovation and IP strategies for university 40 managers and executives of research institutions, including:
 - Preparation of a full training concept (including objectives, content description and methodology)
 - Preparation of the training modules – including detailed agenda, training materials, case studies, slides and interactive sessions.
 - Preparation of ex-ante and ex-post evaluation tests (to assess knowledge and expectations of the participants)
- Deliver the designed training modules over a maximum of 5 days, including:
 - Collection of participants' signatures.
 - Collection of ex-ante and ex-posttests (for each module)
- Prepare a final report outlining training objectives, activities, materials, and results. Participants' signatures and tests must be attached to the training report. The report will also include some recommendations for follow-up activities with training participants.



The expert will work under the overall direct guidance of the EBN Impact Manager, in close coordination with the Lebanon Innovate coordinator, Berytech, between mid-September and November 2023.

During the preparation phase, the Expert will work with EBN and Berytech to identify relevant Lebanese best practices that can be introduced during the training itself (either as guest speakers or during onsite visits).

5. Deliverables and Calendar

The Expert will start the work after the validation of the offer by the contractor (kick-off meeting with the expert foreseen for September 18th, 2023) and shall coordinate with the EBN team for the strategy and implementation throughout the whole process.

Deliverable	Deadline
#1. Training concept	22 September
#2. Training curriculum, agenda and toolkit	30 September
#3. Training materials (including pre and post-training test, slides and case studies)	13 October
#4. Training delivery	23-27 October
#5. Final report	15 November

All the deliverables will have to be presented in English and validated by the Contractor before moving to the next step of the assignment. Failure in submitting deliverables or not reaching enough quality may result in a reduced budget allocation. In addition, regular calls will be organized with the contractor.

6. Qualifications and Eligibility

Applicants must fulfill the following requirements:

- At least 7 years' experience in innovation and intellectual property strategies with specific focus on the academic context.
- Proven experience in innovation and IP strategy development for universities and research centers.
- Proven training skills.
- Not exceed the estimated time for the service execution which is mid-November 2023.
- Excellent English speaking and writing skills.



- Previous working experiences with Lebanese universities, researchers and innovation stakeholders is preferred – not mandatory.

7. Timeline and Application

Work will take place between September and November 2023. The tentative week for the implementation of the in-person training is the one starting on October 23rd (23-27 October 2023).

The maximum budget set for this service is 10,000 Euros.

In addition, the Expert will receive up to 260 Euro/day to cover accommodation and subsistence costs (for the expert to spend 1 week in Lebanon and deliver 5 days of in-person training), and up to 600 Euro to cover travel costs (flight).

Candidates should submit the following documents:

- Technical offer (maximum 2 pages) outlining the methodology to conduct the work based on the content suggested in sections: “Activity description” and “Scope of Work”, elaborating it further. It must include an outline of the training curriculum (including examples of relevant tools, case studies and resources), the tentative schedule and the training approaches that will be proposed to the trainees. An implementation calendar should be delivered.
- Financial offer: the Expert(s) should state the personnel dedication expressed in days (1 day = 8 working hours) as well as a lump sum for other costs related to the implementation of work.
- Expert profile (maximum 2 pages): the expert should submit a brief explanation of the qualifications, relevant work experience (CVs shall be included as annex) and references on the topic. Applicants also need to register on the EBN Pool of Experts by filling in the following template: <https://www.surveymonkey.com/r/EBNcall4experts>

Offers must be submitted by Thursday 14th of September 2023, 23:59 CET, by email to Chiara.Davalli@ebn.eu cc: Kristina.Kockova@ebn.eu.

Offers will be assessed according to the following criteria and scores:

- Quality of the technical offer to meet the work objectives > maximum 40 points
- Proven track-record > maximum 35 points
- Financial offer > maximum 25 points

The winning candidate will be notified by email of the selection of the offer.