

The Malta Council for Science and Technology launches a Call for Expression of Interest for the setting up of a pool of Service Providers and Activity guidelines for beneficiaries of

**The COMMERCIALISATION VOUCHER  
&  
FUSION ADD-ON Programmes**

**The Malta Council for Science and Technology is seeking services in these areas:**

- **The Intellectual Property Check (IPC)**
- **The Commercial Viability Test (CVT)**
- **Intellectual Property right registration (IPRR)**
- **Business Plan (BP)**
- **Investors-engagement pitch (IEP)**

Call closes at 23:59 CET on **19<sup>th</sup> January 2024**

# **Call for Expression of Interest for the setting up of a pool of Service Providers 2024 & Activity Guidelines for FUSION Beneficiaries**

## **1.0 General**

This is a Call for Expression of Interest for the provision of advisory support to beneficiaries of the FUSION R&I funding programme, specifically the Commercialisation Voucher Programme and the newly introduced FUSION add-ons, in preparation for the commercialisation of their innovative ideas within the local and/or foreign markets,

This expression of interest is open to Service Providers specialising in the following areas:

- ✓ **Intellectual Property Check.**
- ✓ **Commercial Viability Test**
- ✓ **Intellectual Property Right Registration.**
- ✓ **Business Plan**
- ✓ **Investor- engagement pitch**

This call primarily aims to engage the services of Service Providers to deliver support to local researchers and industry players by providing them with expert knowledge, and indispensable tools which would equip them with the necessary skills to overcome challenges, which they may encounter while developing their ideas into market-ready realities, with a final view to developing commercially viable, innovative products and services. It is therefore crucial that all services provided are tailored to the unique and specific requirements of the beneficiaries and the respective Technology Readiness Level of their innovation, not only within the local context, but also within the international arena.

The final objectives of the activities to be conducted by the Service Providers are:

- To raise the level and profile of locally funded research.
- To ingrain research and innovation at the heart of the Maltese economy.
- To spur knowledge-driven and value-added growth; and
- To sustain improvements in the quality of life

These aims are sought to be achieved through rendering research ideas into commercially viable activities that result in a multiplier effect on the economy at large.

## **2.0 Background**

FUSION is a portfolio of national funding programmes that provide financial support to Maltese researchers. aims to support Maltese based entrepreneurs to perform research and innovation (R&I) activities to develop and commercialise their technologies. As of 2022, the MCST offers a comprehensive environment which provides support for novel technologies at all stages, from the initial concept all the way till the ultimate commercialisation of the novel technology. FUSION provides the fora where public and private entities can invest their research efforts to create innovative, eco-efficient products and services. FUSION enables the Maltese economy to flourish, thus becoming more resource-efficient, competitive, and appealing to foreign investors. The FUSION programme prioritises projects which fall within the following Smart Specialisation Areas, namely:

- 1) **Future Digital technologies**
- 2) **Marine and Maritime Technologies**
- 3) **Health and Well-being**
- 4) **Aviation and Aerospace**
- 5) **Sustainable use of Resources**
- 6) **Smart Manufacturing.**

The Commercialisation Voucher Programme (CVP) consists of two stages:

- ✓ **IP Check** and the
- ✓ **Commercial Viability Test**

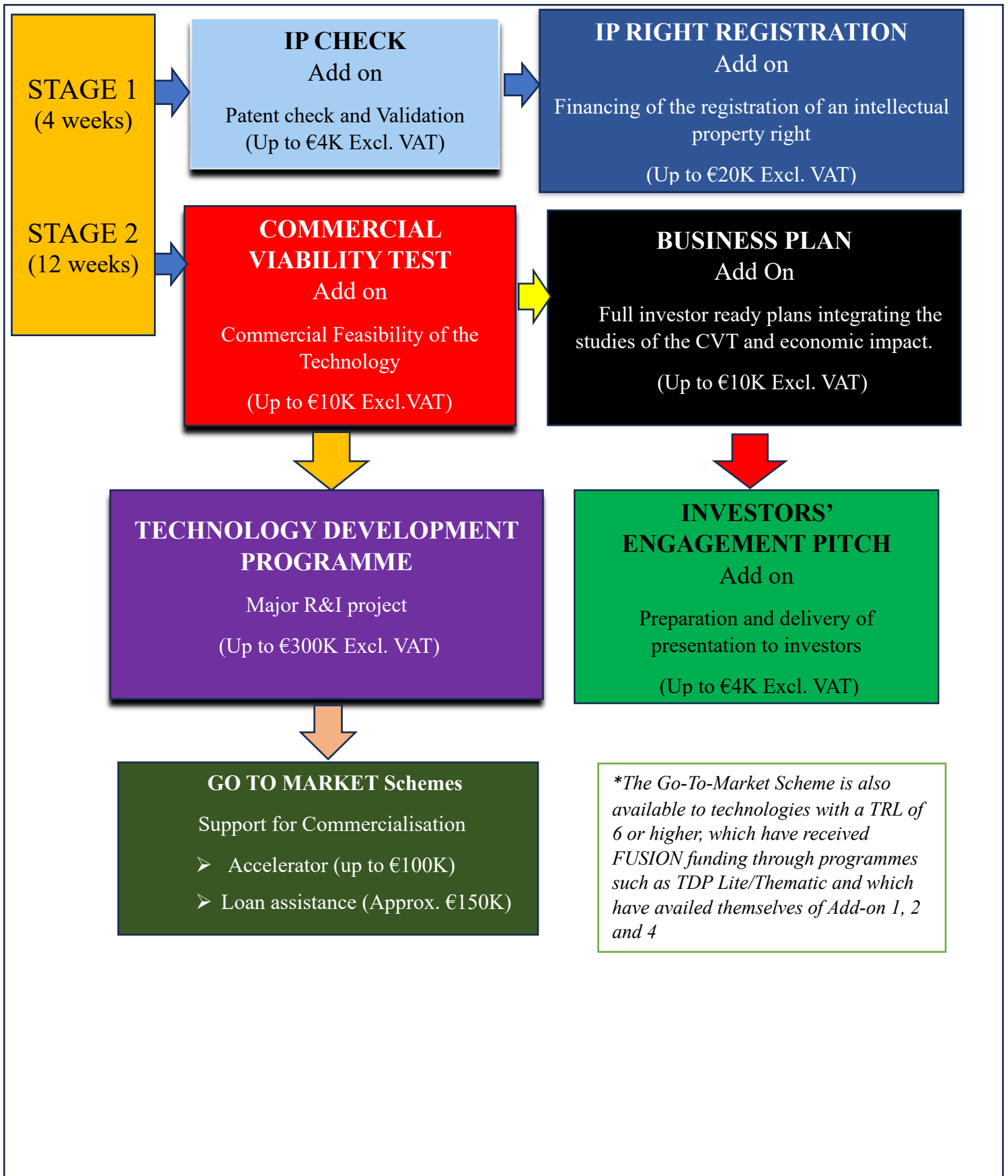
Each stage purports to assess the commercialisation potential of the proposed technology prior to the actual undertaking of any further research and development under the Technology Development Programme or under any other FUSION programme.

The Technology Development Programme, widely referred to as the TDP provides state financing in the form of a pre-financed grant to research and develop an innovative technology in the science and technology realm. The TDP funds the actual development of the research and innovation proposal with the possibility that a prototype of the proposed solution evolves during the course thereof. To further supplement the research, the beneficiaries of the FUSION programme may avail themselves of Add-on vouchers such as IP Registration, Business Plan, and Investors' engagement pitch. These Add on vouchers may be utilised by any FUSION beneficiary except those receiving funds under the Technology Extension Support Programme (TESP) or the Research Excellence Programme (REP).

Figure 1 overleaf illustrates the FUSION roadmap departing from the Commercialisation Voucher Programme (TRL 2-5), via the Technology Development Programme and terminating together with the related timelines for each stage as well as the cost of the activities.

**All costs are exclusive of VAT.**

## COMMERCIALISATION VOUCHER PROGRAMME & FUSION ADD-ONS



### **3.0 Service Requirements**

**3.1** Service Providers are expected to assist beneficiaries of the FUSION R&I Programmes so that the latter are better prepared in terms of project proposal and validation.

**3.2** The services which may be allocated to persons or entities registering under this call shall consist of all those tasks necessary to conduct and conclude the Stage or the Add-on assigned.

**3.3** The selected Service Providers may be either an individual(s) or an organisation(s) with a proven track record relevant to conduct 1) an Intellectual Property Check through to the last phase of the IP Registration; 2) Commercial Viability Test 3) Intellectual Property Registration 4) Business Plan and/or 5) Investors' Engagement Pitch.

**3.4** Service Providers will be expected to work on their own initiative and in an iterative manner with the beneficiary. Applicants must be able to deliver the entire product of each stage applied for, and within the stipulated timeframes.

### **4.0 Duration of Contract and Conditions**

**4.1** The General Conditions applicable to Government Contracts for Service shall not apply to this Call. The justification for this is that the Service Provider will be paid directly by the Beneficiary to whom the Council awards the R&I project funding and not by the Council.

**4.2** The Council does not bind itself to accept any Expression of Interest submitted under this Call.

**4.3** Service Provider/s shall bind themselves to conduct such assignments in accordance with the terms of this Call.

**4.4** Any additional information or clarification, as may be requested by the MCST, shall be deemed to form an integral part of the original assignment.

**4.5** Applicants must have a proven and successful track record of work in the respective fields.

**4.6** Post-selection allocation of assignments under this Call will not be the responsibility of the Council. The FUSION Beneficiary will be requested to put the Service Providers in his/her order of preference. The beneficiaries will then be assigned their preferred choice, provided that the Service Provider has not been allocated a task already under that same call. The list of approved service providers will be published online.

**4.9** The selected Service Providers will be expected to sign a formal contractual undertaking for the provision of services within two weeks from being notified of the conclusion of the adjudication process and placing in an order of merit by the Council.

**The order of merit will be based on two sections of equal weight for each Stage Activity, Relevant Entity Activity Experience, Lead Consultant and Team Experience.**

**4.10** Service Provider/s shall, with exception to information that is already in the public domain, not disclose to any third party any of the information obtained during the course of this call: or, in the event of a service allocation, during the course of service delivery, without the prior written consent of both the Council and the Beneficiary. Moreover, the Service Provider/s must ensure that employees and any other persons who may be engaged to assist them during this Call shall similarly be bound. Information must be protected and used in accordance with the provisions of the Data Protection Act 2001. Service Providers will be expected to sign a Non-disclosure Agreement.

**4.11** Service Providers must identify a Contact Person/s. The contact person(s) shall be the only point of reference between the Council and the Service Provider. Communication from third parties shall not be recognised.

**4.12** The agreement shall run for a period of three (3) years between February 2024 and January 2027.

**4.13** Once the Stage report or the Add on assignment carried out by the Service Provider has been positively evaluated by the expert independent evaluator/s appointed by the Council, the Service Provider will issue an invoice directly to the Beneficiary of the FUSION programme and the latter will settle payment directly with the Service Provider.

**4.14** A Service Provider may be blacklisted and have their contract of services terminated, if services are unjustifiably not delivered within the time frames stipulated by the Council as noted below. The timeframes start from the day on which the MCST voucher letter is sent to the beneficiary.

**4.15** Unless otherwise instructed by the Council, a Service Provider may not participate in more than two (2) consultancy service per call per stage. This restriction is not applicable to FUSION Add-ons. A Service Provider conducting an IP Check, will be expected to process the respective IP Registration application thereof. Similarly, a Service Provider who has conducted the Commercial Viability Test would be required to proceed with the Business Plan and the Investor's Engagement Pitch Add on for the same funded project.

**4.16** If any disagreement or dispute arises out of the contract signed between the selected Service Providers and the Council, such matter may be referred to arbitration under the Arbitration Rules and Procedures established by the Laws of Malta

**4.17** The Council requests that interested Service Providers submit their Expressions of Interest for the following activities which are financed through FUSION.



The Malta Council for  
**Science & Technology**

## INTELLECTUAL PROPERTY CHECK

### Expected Consultants' Criteria

Relevant qualifications of named consultants and/or associates should include a Bachelor of Sciences Degree in a Stem subject as well as a relevant qualification in Law. To be eligible to apply for this activity, the consultant must be registered as a European Patent Attorney or a National Patent Attorney. IP Lawyers who are not registered as either a Patent Attorney, a Patent Agent, or a Registered Patent Attorney and who are merely affiliated with a qualified Patent Attorney, cannot apply for this activity.

Minimum 3 years' post qualification experience in IP protection, including the preparation and filing of patent applications; prosecution of the applications worldwide and access to a network of patent experts around the world, searches, and registration as well as access to licensing specialists.

Identification of the Patent Attorney and any associates and/or subcontractors working on the project and the associated experience and qualifications.

The main consultants, associates or subcontractor working on this activity should be identified and a profile should be provided. These can be then adapted according to the project in question and communicated to the Council prior to the actual undertaking of the activity.

### Description of Activities

Includes but not limited to: Patent check, validation and scientific opinion and preliminary registration.

### Stipulated Timeframe

4 weeks

### Fee

€4,000



# COMMERCIAL VIABILITY TEST

<u>Expected Consultants' Criteria</u>	<u>Description of Activities</u>	<u>Stipulated Timeframe</u>	<u>Fee</u>
<p>ACCA/ Bachelor of Commerce (Accountancy Major), a degree in Marketing or Bachelor of Commerce in Accountancy and Marketing or Bachelor of Commerce in Banking, Finance and Marketing or</p> <p>Bachelor of Commerce in Economics and Management or equivalent</p>	<p>Desktop market research; analysis of economic bearing; key performance indicators; investment potential; revenue, employment; and the assessment of the different types and levels of risk involved if the technology were to be Commercialised.; specialised research data; primary source data including transcripts and analysis with potential technology buyers; analysis of different production options including costings; analysis of resources, plant, and equipment; and logistics.</p>	<p>12 weeks</p>	<p>€10,000</p>

# INTELLECTUAL PROPERTY RIGHT REGISTRATION

<u>Expected Consultants' Criteria</u>	<u>Activities covered</u>	<u>Stipulated Timeframe</u>	<u>Fee</u>
<p>Relevant qualifications of named consultants and/or associates should include a Bachelor of Sciences Degree in a STEM subject as well as a relevant qualification in Law. To be eligible to apply for this activity, the consultant must be registered as a European Patent Attorney or a National Patent Attorney. IP Lawyers who are not registered as either a Patent Attorney, a Patent Agent, or a Registered Patent Attorney and who are merely affiliated with a qualified Patent Attorney, cannot apply for this activity.</p> <p>Minimum 3 years' post qualification experience in IP protection, including the preparation and filing of patent applications; prosecution of the applications worldwide and access to a network of patent experts around the world, searches, and registration as well as access to licensing specialists.</p> <p>Identification of the Patent Attorney and any associates and/or subcontractors working on the project and the associated experience and qualifications. The main consultants, associates or subcontractor working on this activity should be identified and a profile should be provided. These can be then adapted according to the project in question and communicated to the Council prior to the actual undertaking of the activity.</p>	<p>Updated IP Check, Drafting of the claims, Draughtsman drawings.</p> <p>Patent Attorney Fees, Revision of the initial search report and subsequent amendments required to be made to the draft at PCT filing.</p> <p>Filing PCT application at 12 months</p> <p>Addressing formalities objections raised by the international receiving office.</p> <p>Passing on the international search report and publication notice</p>	<p>3 Years from the issue date of the FUSION Add on</p>	<p>€20,000</p>

# BUSINESS PLAN

<u>Expected Consultants' Criteria</u>	<u>Contents</u>	<u>Stipulated Timeframe</u>	<u>Fee</u>
<p>Bachelor of Commerce in Accountancy and Economics or Bachelor of Commerce in Banking and Finance and Economics or Bachelor of Commerce in Economics and Management or Business Administration or equivalent.</p>	<p>Executive summary. Description of the Company /Management Team Market analysis and market potential. Business concept and business model (Unique selling proposition, revenue generation model, market segments) IP Strategy Competitors Economic Risk Assessment Estimation of Cost and Revenue Management and Operational Plan Financial Analysis Major achievements, business strategy, and operational plan for the next 5 years</p>	<p>15 weeks</p>	<p>€10,000</p>

# INVESTORS' ENGAGEMENT PITCH

<u>Expected Consultants' Criteria</u>	<u>Contents</u>	<u>Stipulated Timeframe</u>	<u>Fee</u>
<p>Bachelor of Commerce in Accountancy and Economics or Bachelor of Commerce in Banking and Finance and Economics or Bachelor of Commerce in Economics and Management or Business Administration or equivalent</p>	<p>Includes but is not limited to the preparation and delivery of presentations at international fairs, with potential investors or with technology purchasers.</p>	<p>12 weeks</p>	<p>€4,000</p>



## **5.0 Instructions and Application**

Interested parties are requested to submit their response and all required supporting documentation clearly marked **“Call for Expression of Interest for the setting up of a pool of Service Providers and Activity guidelines for FUSION beneficiaries in [select preferred area(s)]”**

Applicants are requested to submit their response and all relevant documentation (mentioned in points 1 -10) below in electronic format, by not later than **23:59 hrs on 19<sup>th</sup> January 2024** to [service-providers.mcst@gov.mt](mailto:service-providers.mcst@gov.mt) . Any inquiries must be made to [claudine.dimech@gov.mt](mailto:claudine.dimech@gov.mt).

Applicants are to ensure that their submissions fully comply with the checklist under Annex 01. All documents submitted should be signed by the legal representative of the entity or, by the applicant in the case of self-employed registrants. Failure to provide any or all supporting documents stipulated in points 1-10 below would render the application administratively non-compliant. During the preparation, submission, and any other process relevant to the submission and adjudication of this Call, potential Service Providers shall be guided by the following requirements:

1. A covering letter clearly listing the areas applied for and a profile of the applicant.
2. A detailed Euro pass Curriculum Vitae of the Personnel who will be assigned work on the allocated projects.
3. A copy of the relevant Education certificates of the Personnel who will be assigned work on the allocated projects.
4. A Copy of the VAT certificate (or equivalent)
5. A copy of the Company registration certificate (if applying as an entity).
6. Two recent trade references (an exemption is made in the case of IP Check and Intellectual Property Right Registration only)
7. Annex 01
9. Annex 02
10. Annex 03

*It is the responsibility of the applicant to ensure that they are provided with a written confirmation of receipt of their application.*

## Annex 01 – SUBMISSION CHECKLIST

This checklist is intended to facilitate submission. Candidates are requested to submit a copy of the checklist together with all relevant documents in sequence.

REF	SUBMISSION TASK	CHECK BOX
1	A covering letter clearly listing the areas applied for and a profile of the applicant.	
2	A Curriculum Vitae of the Personnel that will be assigned work on the assigned projects.	
3	A copy of the relevant Education certificates of the Personnel who will be assigned work on the allocated projects.	
4	A Copy of the VAT certificate (or equivalent).	
5	A copy of the Company registration certificate (if applying as an entity).	
6	Two recent trade references (an exemption is made in the case of IP Check and Initial Patent Application only).	
7	Annex 01.	
9	Annex 02	
10	Annex 03	

**Note:** *An inability to provide any of the above will lead to categorical exclusion.*



## ANNEX 02

### RELEVANT ENTITY ACTIVITY EXPERIENCE

<p><b>ACTIVITY BEING APPLIED FOR:</b></p> <p><i>(Must be completed for every activity e.g., IP check, as per Table in Section 4)</i></p>	
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**I. RELEVANT ACTIVITY EXPERIENCE** *(List at least five (5) initiatives that the Entity has been responsible for in the above activity).*

#	CLIENT	PROJECT TITLE	DESCRIPTION OF WORK	YEAR OF ENGAGEMENT
1				
2				
3				



<b>4</b>				
<b>5</b>				
<b>6</b>				
<b>7</b>				



II. **RESEARCH AND INNOVATION EXPERIENCE** (*Provide at least 3 concrete examples of consultancy services that the applicant has carried out in the area of R&I and the duration of your engagement*).

#	CLIENT	PROJECT TITLE	DESCRIPTION OF WORK	YEAR OF ENGAGEMENT
1				
2				
3				

### III. EXPERIENCE IN CONSULTANCY SERVICES FOR FUSION AND OTHER NATIONAL / INTERNATIONAL EXPERIENCE

*(Provide at least 5 concrete examples)*

#	NAME OF FUNDING PROGRAMME	PROJECT TITLE AND ABSTRACT	TRL RESEARCH PROPOSAL AT THE TIME-OF-SERVICE PROVISION
1			
2			
3			



<b>4</b>			
<b>5</b>			
<b>6</b>			
<b>7</b>			
<b>8</b>			



## ANNEX 03

### RELEVANT PERSONNEL EXPERIENCE

<b>ACTIVITY BEING APPLIED FOR</b> <i>Must be completed for every activity e.g., IP check, as per Table in Section 4</i>	
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*Kindly elaborate on the entity's experience with international clients:*

<b>Lead Consultant (Name &amp; Surname):</b>	
<b>Activity related degree:</b>	



<b>Science related qualification:</b>	
<i>Personal Experience on Specific R&amp;I Projects and number of years of R&amp;I experience:</i>	
<b>Supporting Staff (Name &amp; Surname):</b>	
<b>Activity related degree:</b>	
<b>Science related qualification:</b>	



*Personal Experience on Specific R&I Projects and number of years of R&I experience:*

<b>Supporting Staff (Name &amp; Surname):</b>	
<b>Activity related degree:</b>	
<b>Science related qualification:</b>	
<b>Personal Experience on Specific R&amp;I Projects and number of years of R&amp;I experience:</b>	



<b>Supporting Staff (Name &amp; Surname):</b>	
<b>Activity related degree:</b>	
<b>Science related qualification:</b>	
<i>Personal Experience on Specific R&amp;I Projects and number of years of R&amp;I experience:</i>	

<b>Supporting Staff (Name &amp; Surname):</b>	
<b>Activity related degree:</b>	
<b>Science related qualification:</b>	

Personal Experience on Specific R&I Projects and number of years of R&I experience:

It is the responsibility of the applicants to ensure that they are provided with a written confirmation of receipt of their application.