

INTELLECTUAL

PROPERTY



BACKGROUND AND CONTEXT

This session deepens the KALEIDOS innovation training journey by addressing a critical and often underestimated component of knowledge valorisation: intellectual property (IP). It equips participants with practical strategies to identify, protect, and manage the outputs of research and innovation activities, ensuring that ideas can evolve into assets with societal and economic value.

OBJECTIVE

To provide participants with essential knowledge on how to identify, protect, manage, and exploit intellectual property rights in research and innovation, both individually and in collaborative settings.

TARGET AUDIENCE

- ◆ Researchers, innovators and technology developers
- ◆ Project coordinators and research managers
- ◆ Teams participating in KALEIDOS with innovation-oriented outputs
- ◆ TTO/KTO professionals and early-career entrepreneurs

METHODOLOGY AND CONTENT

This session was delivered in the format of an expert-led seminar, combining theoretical foundations with practical guidance. The structure aimed to provide researchers and innovation professionals with a comprehensive understanding of how to protect and manage intellectual property (IP) in alignment with real-world research and innovation practices.

The content was organised around four key thematic blocks:

► 1. WAYS TO PROTECT R&D+I PROJECTS

Participants were introduced to the main categories of intellectual property rights (IPR) relevant to research, development, and innovation:

- ◆ Patents and utility models for technical inventions
- ◆ Trademarks and industrial designs for branding and visual identity
- ◆ Copyright and trade secrets for software, data, and know-how
- ◆ Comparative examples were provided to clarify what type of protection applies in each case.

▶ 2. THE ROADMAP TO PROTECTING INNOVATIONS

The trainer outlined the typical IP protection process, from the early stages of idea development to national and international protection:

- ◆ Prior art and novelty search
- ◆ Filing strategies at national (OEPM), European (EPO, EUIPO), and global (WIPO) levels
- ◆ Freedom to Operate (FTO) analysis to prevent infringement risks
- ◆ Timing, costs, and alignment with the project's exploitation plan

▶ 3. PROCEDURES AND TOOLS TO MANAGE AND PROTECT IP

Emphasis was placed on practical tools that support IP strategy in academic and collaborative environments:

- ◆ Non-Disclosure Agreements (NDAs) and Memorandums of Understanding (MoUs)
- ◆ Templates for licensing and joint ownership
- ◆ Internal protocols for safeguarding know-how and publication timing
- ◆ Use of digital proof-of-authorship tools such as blockchain or timestamping

▶ 4. THE ROLE OF IP IN COLLABORATIVE PROJECTS

The session closed with a discussion on how to manage IP in multi-partner settings, such as EU-funded projects or public-private collaborations:

- ◆ Shared ownership and exploitation clauses
- ◆ Open innovation models vs closed proprietary approaches
- ◆ Risk mitigation in interdisciplinary and cross-sectoral teams
- ◆ Institutional roles and support mechanisms (e.g. TTOs, legal offices)

This structured methodology provided participants with the clarity, tools, and confidence to start applying IP protection strategies to their own innovations—both within the KALEIDOS framework and beyond.

MATERIALS NEEDED

To support the seminar and facilitate a practical understanding of intellectual property management, the following materials were provided:

- ◆ Presentation slides summarising key concepts, legal frameworks, and real-world examples related to IP protection
- ◆ Visual charts detailing the main types of intellectual property, their scope, duration, and eligibility criteria
- ◆ Case study summaries, used to prompt discussion around typical IP challenges in research and innovation settings
- ◆ Access to public IP databases (e.g. Espacenet, EUIPO, OEPM, WIPO), enabling participants to explore patents, trademarks, and prior art

All materials were designed to be fully adaptable for both face-to-face and online delivery, ensuring inclusive and flexible participation across formats. The [slides used in session 6](#) can be found on the KALEIDOS website.

EXERCISES FOR FACE-TO-FACE AND ONLINE SESSIONS

Given the specialized and intensive nature of the session, no structured exercises were carried out. The session was designed as an informative seminar, focused on the transmission of key concepts, legal frameworks and good practices related to intellectual property in research and innovation contexts.

OUTCOMES OF THE SESSION SKILLS AND COMPETENCES ADDRESSED

This session provided participants with a solid foundational understanding of intellectual property (IP) as a key component of responsible innovation and knowledge valorisation. Through expert-led input and real case examples, participants gained clarity on the tools, procedures, and considerations needed to protect research-based outcomes effectively and ethically.

► KEY OUTCOMES

- ◆ Improved awareness of the main types of intellectual property and their relevance to different innovation outputs
- ◆ Understanding of the roadmap for protecting innovation at national, European, and international levels
- ◆ Insight into risks and responsibilities related to disclosure, ownership, and collaborative project management
- ◆ Practical orientation towards engaging with institutional support structures (e.g. TTOs, legal offices)

► SKILLS AND COMPETENCES ADDRESSED

The session contributed to several transversal and role-specific skills outlined in the D1.1 portfolio, including:

- ◆ **Promote the transfer of knowledge** – The session focused on mechanisms to protect and manage results in ways that enable transfer to other sectors and applications.
- ◆ **Apply research ethics and integrity principles** – Ethical considerations around ownership, authorship, and responsible protection of results were discussed.

- ♦ **Manage research data** – Participants learned how data protection relates to IP and how to manage it accordingly, including issues of confidentiality and licensing.
- ♦ **Increase impact of science on policy and society** – Intellectual property was framed as a lever for amplifying the real-world impact of innovation by enabling exploitation and application.
- ♦ **Strategic thinking** – Participants were encouraged to consider IP protection as part of a broader innovation and valorisation strategy.
- ♦ **Critical thinking** – The session promoted an analytical view of when, how, and why to protect intellectual assets in alignment with open innovation principles.
- ♦ **Interact professionally** – Participants reflected on roles and responsibilities when working with legal and tech transfer offices, collaborators, or industry partners.
- ♦ **Decision making** – Choosing the appropriate IP pathway (e.g. patent, copyright, design rights) requires contextual, informed decisions aligned with project goals.
- ♦ **Practical insights** – The session focused on real-life scenarios and institutional procedures to equip researchers with applied knowledge of IP.
- ♦ **Mobilise resources** – IP was connected to resource generation through licensing, spin-offs, or collaborative agreements.

Overall, the session reinforced the ability of participants to act as informed, proactive agents in the responsible protection and exploitation of research results, in alignment with Open Science and mission-driven innovation goals.



**Funded by
the European Union**

Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or other granting authorities. Neither the European Union nor the granting authorities can be held responsible for them.

