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Intellectual Property Booster

Run by META Group and ClearViewIP,
supported by the European Commission

In a nutshell: Intellectual Property Booster

- Who
 - Client: DG Research & Innovation
 - Beneficiaries: Public Research Organisations with a PIC
- 5 Services available
 - Patents, design and trademark applications
 - Initial IP Audit
 - Patent landscaping
 - IP evaluation / due diligence
 - Negotiating technology transfer

Five Services

IP Booster provides you with five services, designed to fit your specific public research organisation's needs. Read our service descriptions and pick which services are right for you, or apply for all 5!

 <p>Initial IP Audit</p> <p>A systematic review of intangible assets, giving you an overview of your current IP position and recommended actions to improve.</p>	 <p>Patent Landscaping</p> <p>This service comprises a detailed review of the competitive IP relative to the research group's specific area of interest. This service is ideal for technology projects moving towards the market as well as mature protected technologies that could be exploited more strongly.</p>	 <p>IP evaluation or due diligence</p> <p>This service comprises an audit with technological, legal and market dimensions, to assess the quantity and the quality of intellectual property assets owned by (or to be acquired by) a PRO or university.</p>
 <p>Patents, design and trademark applications</p> <p>Have an idea that you want to legally protect? This service will first assess whether the idea is novel and then make contact with an attorney firm who can take it forward. This service can be valuable at the beginning of a project to ensure that a project acronym can be transformed into a trademark.</p>	 <p>Negotiating technology transfer</p> <p>Ideal for TTOs who do not have a lot of experience in negotiating licensing deals. We can provide advice and support in negotiating technology transfer agreements, be they in or out licensing, acquisition, or assignment of IPRs.</p>	 <p>Frequently Asked Questions</p> <p>Wondering how to apply? If you are eligible? When the next call is open? Check our FAQs here</p>

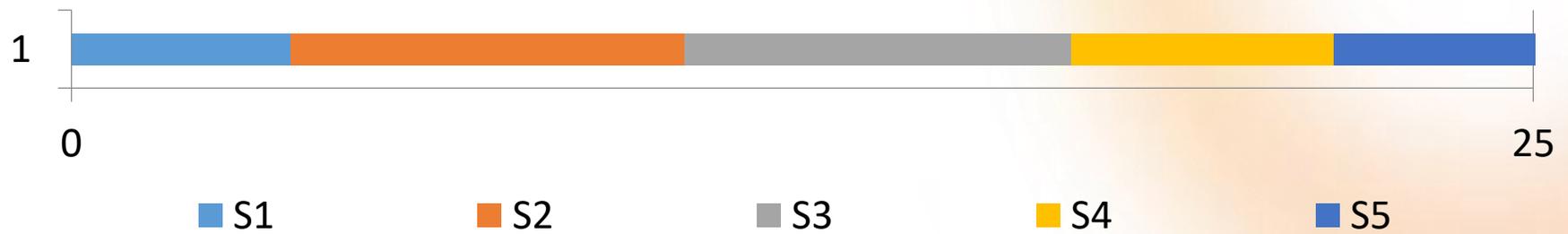
[https://ipbooster.meta-group.com/
ipbooster@meta-group.com](https://ipbooster.meta-group.com/ipbooster@meta-group.com)

Eligibility and funding limit

Eligible organizations:

- Public universities
 - Private universities registered with national authorities as accredited universities.
 - Government funded research institutes
- Who have an existing EC 'PIC' code.***

Funding: Up to a maximum equivalent of 25K



Application and assessment process



1. Registration

- on the IP Booster website
- PIC code and email address



2. Application:

- Download, complete, sign and up-load the application form
- Call is constantly open



3. Evaluation

- Occurs twice a year



4. Notification

- Within 4 weeks of close of call
- Final timing dependent on the Commission

5. Service delivery

6. Ideally completed within 3 months of notification.



Remote service delivery



1. Service data input sheet



2. Team call



3. Agree action plan



4. Develop analysis and report



5. Feedback and discuss

S5: Likely to include more iterations and feedback points.

S1: Initial IP Audit

A systematic review of intangible assets, providing a snapshot of the current IP position in terms of the amount and type of IP protection.

This service may be requested for the following reasons:

- ✓ To act as a starting point to develop a commercialisation strategy
- ✓ To identify all the foreground that could be exploited from an ongoing or completed research project
- ✓ Need for a comprehensive, holistic view of an IP portfolio, assessed by an objective 3rd party
- ✓ Pragmatic, business-orientated advice based on an IP portfolio and an IP situation
- ✓ Assistance may be required to exploit IP assets and choose the optimal strategy to increase revenue

S1: Initial IP Audit

This service provides the following outcomes:

- ✓ Valuable IP commercial advice on how best to manage, grow and exploit an IP portfolio
- ✓ IP protection advice to guide the research group as to how best protect their innovation
- ✓ Guidance on how to protect the research group's IP when engaging in commercial discussions
- ✓ List of IP assets which can be used in situations such as when spinning-off a company, when entering into an industry collaboration or when there is an investment opportunity

Ideal for

- ✓ Individual research projects as well as PRO IP portfolios.

S2: Patent Landscaping

This service comprises a detailed review of the competitive IP relative to the research group's specific area of interest. Trends and features in the data can be identified through patent analytics.

In particular, a landscape would assist in:

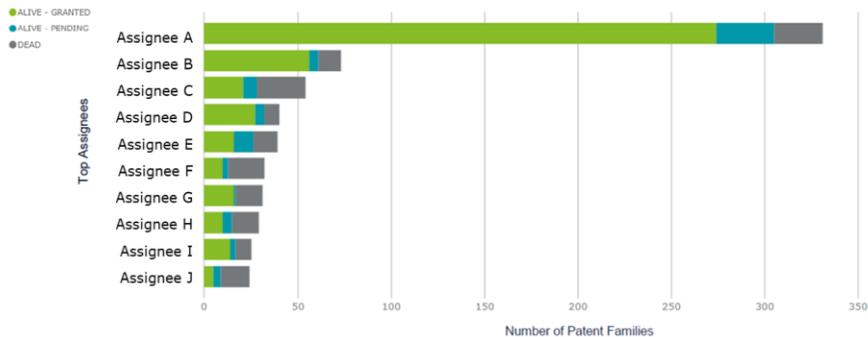
- ✓ Identifying key market players and their patent portfolios
- ✓ Identifying white space to influence the future filing direction
- ✓ Convincing investors that the PRO or university is in a strong position relative to its competitors
- ✓ Informing the product development team of innovations arising in the same technology field
- ✓ Providing suggestions with regards to registering further IP rights
- ✓ Identifying licensing opportunities or commercial partnership opportunities

Ideal for

- ✓ Technology projects moving towards the market as well as mature protected technologies that could be exploited more strongly
- ✓ Single inventions or clusters of similar technology

S2: Example Visuals

Key players

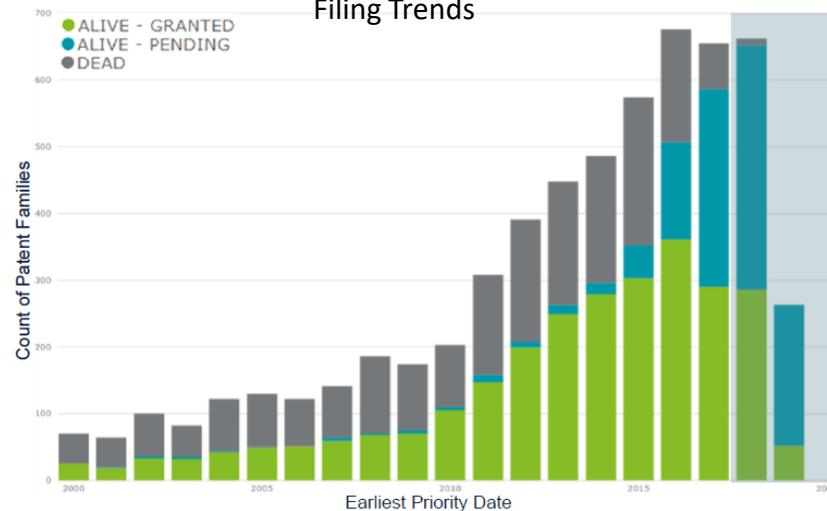


	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Total
Assignee A	20	10	14	23	15	12	22	31	42	34	25	17	12	14		316
Assignee B	3	7	6	8	1	6	3	9	4	6	6	4	1	1	1	71
Assignee C			1	1	5	2		9	6	4	12	5	2	3	4	54
Assignee D		1			1	2	8	5	6	4	5	5		1	2	40
Assignee E																
Assignee F	2	1	2		1		3	3	2	5	6	4	1	6	3	39
Assignee G			2	2	2		6	2	4	4	1	4		1		29
Assignee H	2	2	2	1			2	1		1	2		1	1		27
Assignee I							2	4	4	5	4	4		1	1	25
Assignee J	1	2	3	1	1		2	2	2			1	2			24
						3	1	5	5	2	1	1	2	2	2	24

Key Markets



Filing Trends



S3:IP Evaluation and Due Diligence



- We were commissioned to conduct an IP evaluation, assessing key IP assets owned by one of the major Croatian Universities.
- Specifically, this evaluation was aimed to:
 1. Establish the net present value of the technology
 2. Provide insights into the potential ‘favourable’ and ‘less-favourable’ case scenarios in terms of licensing income and market penetration.
 3. Provide key takeaways and recommendations based on the results of the evaluation

The outcome of the service provided an assessment of the value of key IP assets to the applicant

S3/ Methodology



The following steps were taken in conducting the IP Evaluation:

1. Gather information about the IP assets, the technology and other market data available
2. Conducting market research to gauge likely size of target market and assess competing technologies
3. Build an evaluation model
4. Apply the model parameters and produce valuation outcomes
5. Summarize and comment the findings

S3/ Evaluation approach



1. **Cost approach** correlates the value of the patents to the investment that has gone into generating the portfolio.
2. **Market approach** correlates the value of the patents to the estimated price that the portfolio is likely to have in the open market in an outright patent sale scenario. This approach is built around comparable market transactions, adjusted by the profile of the patents and the applicable market.
3. **Income approach** based on the royalty and milestone cashflows that would be expected to be generated by the portfolio if licensed-out, or the royalty and milestone payments that would be expected to be made to a third-party if the portfolio was owned by a third party and had to be licensed-in (the latter also known as Royalty Relief method)

S3/ Outcomes



- The evaluation was undertaken using the **Income Approach** for a licensing-out scenario of the future granted patents.
- Income Approach Evaluation Assumptions were applied to two potential markets
- The value of the future patent corresponded to the risk-adjusted net present value of the cashflows associated with licensing the patents.
- The valuation included evidence-based estimations of the future target market size, of University's potential market penetration within the market, as well as risk and inflationary factors.

S3 / Takeaways and Recommendations



- Technology development
- Expansion of protection in different jurisdictions
- Patent Landscape
- Freedom to Operate Search
- Apply for Service S5 of IPBooster

S4 / Support in drafting patent, design, trademark applications



- We were commissioned to support the major Italian Research Center in drafting claims of its European Patent (EP) application.
- This service is designed to bridge the gap between ideation and intellectual property application filing. If a research group has an idea that they wish to legally protect, this service offers assistance in assessing whether the idea is novel and then prepare either a draft proposal of patent claims/design images/trademark application based on the idea. Filing strategy - including the best course of action with regards to filing nationally, regionally and/or internationally - was discussed with the IP expert.
- This service is also valuable at the beginning of a project to ensure that a project ACRONYM can be transformed into a trademark.

The outcome of the service provided the drafting of a set of claims for a EP

S4 / Methodology



- The activities provided support on IP related matters connected to the research results dealing with a technology related to “water treatment sector”

The following steps were taken in conducting the IP Evaluation:

- An S3 Template was sent to the applicant, requesting several information and documents
- The applicant provided a set of prior art documents, comprising both patent applications and scientific publications, that was duly analyzed in term of novelty criteria considering the main features of the proposed inventions
- A study of the invented technology was carried out, together with an updated analysis of the related state of the art;

S4 / Outcomes

- The additional novelty search on technical prior art retrieved five main patent documents correlated to the technology under examination.
- Considering the results of the novelty search it was found that the invention under investigation met the novelty criteria for patentability.
- No document was found describing all the key technical features of the invention. It was suggested to pay attention to the inventive step criteria, since the “expert of the field” could combine several prior art patent documents reaching several technical features and advantages of the invention.

A set of claims was drafted proposing to protect:

- the product itself;
 - the method for manufacturing;
 - the device comprising the product.
- A strategy for international protection has been suggested based on the countries of interest indicated by the applicant

S4 / Takeaways and Recommendations



- Filing a European Patent Application at EPO in order to protect the invention in some specific EU countries
- Filing single patent applications in some specific non-EU countries of interest within 12 months from the filing date of the EP application
- Carry out a patent landscape and activate a surveillance system in order to be updated on the state of the art
- Apply for Service S5 of IPBooster

S5: Advice and support in negotiating technology transfer agreements



Strategic support for TTOs and researchers to commercialise their technology

Service can include one or more of:

- ✓ Review of a marketing package
- ✓ Support to identify and contact technology adopters
- ✓ Support to follow up with existing targets
- ✓ Review of the Head of Terms/ licensing agreement
- ✓ Identification of royalty rates
- ✓ Behind the scenes negotiating support
- ✓ Assignment of rights to a spinoff/ researcher



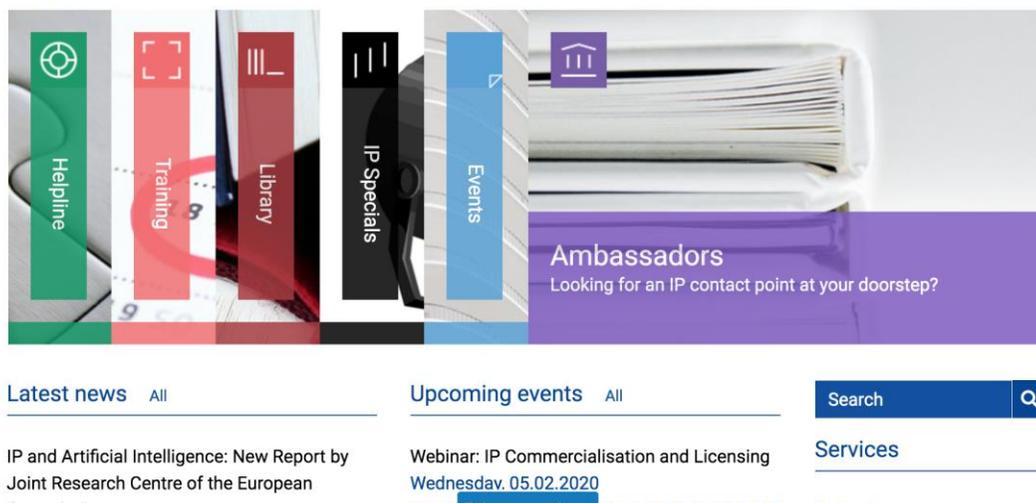
- Often used in combination with with an S3 Valuation service.
- Ideal for TTOs who do not have a lot of experience in negotiating licensing deals.

Find out more!

- Visit IPR Helpdesk for interesting IP webinars

About the European IP Helpdesk

We believe that knowing how to manage your IP effectively can help you promote your business or maximise the impact of your research & innovation project – make sure you stay ahead of the innovation game.



The screenshot shows the European IP Helpdesk website. At the top, there is a navigation bar with icons and labels for 'Helpline', 'Training', 'Library', 'IP Specials', and 'Events'. Below this is a main banner area with a purple background and the text 'Ambassadors' and 'Looking for an IP contact point at your doorstep?'. The page is divided into three columns: 'Latest news' with a link to 'IP and Artificial Intelligence: New Report by Joint Research Centre of the European...', 'Upcoming events' with a link to 'Webinar: IP Commercialisation and Licensing Wednesday, 05.02.2020', and a 'Search' bar. There is also a 'Services' section partially visible.

Sign up to our Knowledge to Market Newsletter for the latest on IP and technology transfer matters:

<https://mailchi.mp/meta-group.com/k2mboostenewsletter>