D4.2 Report on finalised Tool-Box

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Deliverable Information Sheet

Version	
Grant Agreement Number	101135832
Project Acronym	IMPAC3T-IP
Project Title	Improving outcoMes and imPact from scenArio based licensing: Classical_Crisis and Co-creaTed IP
Project Call	HORIZON-CL4-2023-HUMAN-01
Project Duration	36 months
Deliverable Number	D4.2
Deliverable Title	Report on finalised tool-box
Deliverable Type	R— Document, report
Deliverable Dissemination Level	PU - Public
Work Package	WP4
Lead Partner	PP2 UA
Authors	Lisa Cowey, Girish Somawarpet, Yasmina González, Maria Weir, Janne Eskola, Jose Fernandez, Ed Maughfling, Robert Heitzmann and Natalia Zhuravleva
Contributing Partners	PP1, PP3, PP4, PP5, PP6 and PP8
Reviewers	Lisa Cowey
Official Due Date	M24
Delivery Date	M24

History of changes

Version	Date	Description	Author(s)
1.0	22/10/2025	Preliminary draft	G. Somawarpet Y. González
1.1	05/11/2025	Reviewed draft	L. Cowey
1.2	10/11/2025	Draft	N. Zhuravleva, R. Heitzmann, M. Weir, L. Cowey, E. Maughfling, J. Eskola and J. Fernandez
2.0	17/11/2025	Revise draft	G. Somawarpet Y. González
2.1	21/11/2025	Draft	N. Zhuravleva, Y. González, G. Somawarpet
3.0	26/11/2025	Final draft report	G. Somawarpet Y. González
3.1	27.11.2025	Final report	L. Cowey

List of Acronyms

AHSS	Arts, Humanities, and Social Sciences
CL	Compulsory Licensing
FAQs	Frequently Asked Questions
FRAND	Fair, Reasonable, and Non-Discriminatory
FOI	Freedom of Information
GAL	Global Access Licensing
GLAM	Galleries, Libraries, Archives, and Museums
GIs	Geographical Indications
KM	Knowledge Managers
LMIC	lower- and middle-income counties
MPP	Medicines Patent Pool
PRO	Public Research Organisation
SIG	Special Interest Groups
STEM	Science, Technology, Engineering y Mathematics
SME	Small and medium-sized enterprise
T/KTOs	Technology / Knowledge Transfer Office
UAEM	Universities Allied for Essential Medicines
VL	Voluntary Licensing
WP	Work Package Universities Allied for Essential Medicines

Keywords list

- Intellectual Property
- IPR management
- Licensing
- Toolbox
- Patent
- Classical+ licensing
- Crisis licensing
- Co-creation licensing

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Executive Summary

Deliverable D4.2 presents the **final, validated version of the IMPAC3T-IP Toolbox**, developed under Work Package 4 (WP4). The toolbox provides a comprehensive set of practical, scenario-based tools to support improved intellectual property (IP) licensing across Europe. It addresses emerging needs beyond traditional patent-based licensing, including digital and SSHA outputs, crisis-driven access requirements, and co-created innovations involving multiple stakeholders.

WP4 designed, developed, tested, and refined these tools through an iterative process combining expert consultation, SIG engagement, structured stakeholder testing, and insights from earlier project analyses (WPs 2 and 3).

The final tool-box is composed of 36 tools. An additional Classical Plus tool (Tool 5) was added to the D4.1 provisional tool-set following the M18 review meeting and one Co-creation tool (Tool-27) was not pursued following testing and feedback.

The final toolbox is organised around **three licensing scenarios**:

1. **Classical Plus** – Tools supporting the licensing of non-traditional, often copyright-based outputs

These include**:** guidelines for Open Science, Creative Commons, SSHA licensing, AI licensing and risk management, GLAM rights-clearance and business models, and geographical indications for craft/industrial products. These tools address growing needs for inclusive, scalable, and impact-driven licensing strategies.

2. **Crisis Licensing** – Tools enabling rapid or equitable access to medical technologies during acute or preventable crises.

These include FAQs, literature reviews, case studies, compulsory licensing resource libraries, rapid voluntary licensing guidance for drugs and medical devices, and comprehensive equitable-access tools for PROs and funding agencies. Updated global access toolkits (ETAF, GAL, AUTM clause bank) are also integrated.

3. **Co-Creation Licensing** – Tools supporting collaborative innovation involving companies, researchers, NGOs, public bodies, patients, and citizen groups.

Tools include agreement frameworks, participant guides, competence assessment tools, results-analysis and continuation-mapping instruments, market-opportunity evaluation tools, PPI-specific IP guidance, and rights-decision tools.

In addition, five **transversal digital tools** enhance cross-scenario usability:

User feedback highlighted the clarity, practical relevance, and usability of the tools, the high value of real case examples, and the innovative contribution of the digital components. Refinements focused on simplification, improved structure, and enhanced guidance.

Overall, the IMPAC3T-IP Toolbox provides a robust, practical, and future-ready foundation for responsible, equitable, and effective licensing. It strengthens European innovation ecosystems by enabling organisations to identify, value, and license their IP and intangible assets more transparently, sustainably, and collaboratively.

1. Introduction

This document constitutes Deliverable 4.2 of the IMPAC3T-IP project. IMPAC3T-IP is a Coordination and Support Action (CSA) that aims to develop, pilot, and foster the sustainable adoption of a scenario-based licensing Toolbox. This Toolbox is supported by a certified user and trainer programme designed to enable efficient intellectual property (IP) licensing, facilitating both market uptake and societal value creation.

The IMPAC3T-IP project supports **three main licensing scenarios**, each addressing specific challenges and opportunities within the IP landscape:

- **Classical Plus**: licensing that encompasses newer types of IP assets, such as those that are not patent-based and therefore differ from the assets forming the core of traditional for-profit licensing approaches.
- **Crisis**: licensing that occurs in response to, or in prevention of, crises such as emerging or preventable medical emergencies.
- **Co-creation**: licensing arising from interactions among multiple and diverse stakeholders, extending beyond classical consortium collaborations and contract research frameworks.

This deliverable represents an output of **Work Package (WP) 4: Tool-box Development and Testing**, which focuses on the design, implementation, and validation of the individual tools comprising the IMPAC3T-IP Toolbox.

1.1 Scope and Objectives WP4

WP4 is dedicated to the development, validation, and dissemination of a practical and scenario-based toolbox of licensing tools. These tools were conceived in response to specific needs identified across the different licensing scenarios, with the overarching goal of supporting a wide range of stakeholders involved in IP management and licensing.

In this context, WP4 comprised five interlinked tasks:

- The design and development of the tools. (**Task 4.1**)
- The establishment of a remote-access testing and feedback platform (**Task 4.2**)
- The structured testing of tools by selected stakeholder groups (**Task 4.3**)
- The refinement and finalisation of tools in both classical and digital formats (**Task 4.4**)
- The production of short professional videos to support user engagement and tool adoption (**Task 4.5**).

Deliverable, D4.2 consolidates the outcomes of the preceding tasks and constitutes an update of D4.1 Report of provisional tool-box (M18). It reflects the results of Task 4.4: Refinement and Finalisation of the Tools. It represents the culmination of the development and validation phase of the IMPAC3T-IP Toolbox, integrating all insights, feedback, and lessons gathered throughout the process.

The development of this toolbox was greatly influenced by the substantial work carried out in Work Packages 2 and 3. These WP established the analytical and strategic basis for the creation of the toolbox. Key challenges, intervention points and user needs within the licensing landscape were identified through detailed case study analyses, targeted discussions with SIGs (Special Interest Groups) and exploratory desk research. The associate results can be found in deliverables D2.1, D2.3 and D3.1.

Following the identification and prioritisation of the tools to be developed, each tool was conceptually designed, technically implemented, and subjected to targeted testing involving diverse stakeholder groups and market actors. Each tool underwent a specific testing process tailored to its particular features and intended use; details of testing are described in the corresponding sections below. These pilot testing activities were instrumental in assessing the usability, effectiveness, and practical relevance of the tools .

Based on the feedback received through these tests and evaluations, the tools underwent a process of optimisation to ensure their technical robustness, ease of use and suitability for the needs of stakeholders. Deliverable 4.2 showcases the final outcome of the validated and operational set of tools.

1.2 Structure of the Document

The present document is structured as follows: **Chapter 1** outlines the objectives of WP4 and provides a summary of the activities undertaken to achieve its main outcome t.

Chapter 2 provides a comprehensive overview of the IMPAC3T-IP toolbox, outlining its overall structure, classification framework, and composition. It explains how the tools have been categorised within the three main licensing scenarios: Classical Plus, Crisis, and Co-creation. The rationale for this classification is discussed, together with the criteria used to assign individual tools to each scenario.

Subsequently, the chapter details the composition of the final toolbox for each scenario. . It also includes a section dedicated to cross-cutting software tools that can be applied across all three contexts. Within each subsection (*Classical Plus, Crisis,* and *Co-creation*), a brief introduction is followed by a list and concise description of the tools developed for that scenario. It also outlines the testing and validation processes carried out to refine and finalize each tool for inclusion in the definitive version.

Chapter 3 highlights the feedback received from testers regarding the developed tools and their practical usefulness. The objective is to summarize key insights gathered during the testing phase, reflecting the perspectives of end users and stakeholders who evaluated the tools in real or simulated contexts.

Chapter 4 concludes the document by outlining the objectives achieved throughout the course of the work package. It provides a concise synthesis of the main results obtained during the development and testing of the tools, highlighting their contribution to the overall aims of the IMPAC3T-IP project.

2. Overview and Structure of the Toolbox

2.1 General Overview

This section introduces the full set of licensing tools developed under the IMPAC3T-IP project to meet the evolving needs of stakeholders across Europe.

A total of 36 tools were provisionally identified for development (D4.1).

The final tool-box is composed of 36 tools. However, an additional Classical Plus tool (Tool 5) was added at the suggestion of the External Monitor (EM) following the M18 review meeting and one Co-creation tool (Tool-27) was not pursued following testing and feedback.

The original KPIs for this task were:

- Total number of tools tested: 30.
- Total number of tools finalised: 24.

The KPI for this task has therefore been met and exceeded.

2.2 Scenarios and Tool Categories

The IMPAC3T-IP Toolbox brings together two main categories of tools, each designed to address distinct yet complementary needs within the IP licensing ecosystem. The first category comprises document-based tools, such as templates, guidelines, procedural checklists, and model licensing clauses, which serve as practical and adaptable reference materials. The second category includes technology-enabled software tools, such as licensing aggregation platforms and AI-assisted chatbots, developed to enhance efficiency and facilitate digital engagement in licensing processes.

These tools have are distributed across the three scenarios.

For practical purposes, the software-based tools have been presented separately, as they are transversal in nature and can be applied across all three scenarios. This distinction facilitates a clearer understanding of their functionality and broader applicability.

By combining traditional text and modern digital formats, the toolbox ensures both practical utility and technological scalability, enabling stakeholders to adopt tools that best fit their operational capacities and strategic goals. .

2.3 Toolbox Composition

The following section provides a detailed presentation of each scenario and the corresponding tools developed to address the specific gaps and needs identified within it. Each subsection outlines the rationale behind the scenario, followed by a concise description of the tools designed to support stakeholders operating in that context.

2.2.1. Classical Plus Scenario

As outlined above, the “Classical Plus” scenario represents an evolution of traditional licensing approaches, expanding beyond the conventional focus on patents and exclusive licenses for economic return. It reflects a growing emphasis among PROs, non-profit institutions, and policymakers across the EU on achieving broader societal and environmental impact through knowledge transfer.

In this context, licensing is increasingly applied to a diverse range of IP assets, particularly those arising from the Social Sciences, Humanities and Arts (SSHA), as well as from digital

resources such as databases, multimedia, and educational tools. These assets, often governed by copyright rather than patent law, require novel licensing models that prioritise accessibility, inclusion, and long-term value over short-term financial gain.

This shift calls for the development of sustainable and scalable business models capable of managing "low value, high volume" or "long tail" licensing. Such models must accommodate new types of users and uses, ranging from educational initiatives and public awareness campaigns to digital heritage dissemination and AI-based datasets, while also addressing issues of cost recovery, rights clearance, automation, and IT security.

The tools developed within the Classical Plus scenario aim to support this transformation by helping stakeholders to:

- Navigate the complexities of copyright-based and open licensing models (e.g., Creative Commons (CC));
- Address challenges in the licensing of digital and multimedia assets.
- Create inclusive, impact-driven licensing pathways for non-traditional outputs.
- Develop viable models that balance accessibility with financial sustainability.

Further sections of this chapter will provide an in-depth analysis of each tool, explaining its specific focus, target audience and methodology.

Description of the Tools

Tool 1. Guidelines and considerations for IP in Open Science

Reason for creation: This document was created to support non-STEM academics, particularly in the social sciences, in understanding and managing copyright ownership, disclosure obligations, and licensing considerations in academic publishing. It responds to the need for accessible, practical guidance on navigating intellectual property rights in research outputs.

Description: The present tool offers a structured and user-friendly framework to clarify ownership rules, access rights, confidentiality requirements, and CC licensing options within academic publishing. The document explains key concepts and procedures in an approachable way, helping researchers make informed decisions about publishing and licensing while ensuring compliance with legal and ethical standards.

Testing Methodology: Feedback from a questionnaire sent to various social science researchers has led to revisions and refinements of the document. This process has ensured that the guidelines address real-world challenges and reflect the practical needs of academic users while remaining accessible to those with limited prior knowledge of intellectual property rights management.

Target Audience: The primary audience includes individual researchers in the social sciences and T/KTO professionals who support academic publishing activities. It is also relevant to authors and editors involved in producing monographs, book chapters, edited volumes, journal articles, research reports, datasets, software, and other research outputs

User Access: Unrestricted

Tool 2. Guidelines on Creative Commons (CC)

Reason for creation: This tool was developed to address a gap in how CC licenses are typically understood and applied within academic and non-STEM research environments. While CC licenses are often approached from a legal or compliance-oriented perspective, many researchers lack guidance on how open licensing can also support broader strategic goals.

The initiative therefore aims to provide a complementary perspective, one that highlights the potential of CC licensing to enhance business development, drive innovation, increase the visibility and reuse of research outputs, and contribute to sustainable growth. By reframing open licensing as both a legal framework and a strategic asset, this tool helps academics make informed decisions that maximize the reach, impact, and value of their work.

Description: The purpose of this tool is to provide a comprehensive overview of the various CC licenses, outlining their applicability, relevance, and potential uses across different sectors. The document begins with a practical guide describing the employability and key features of each license, complemented by visual elements designed to facilitate understanding of their meanings and practical implications.

In addition, the document highlights how CC licenses can actively support business development and growth, demonstrating that open licensing is not incompatible with commercial objectives.

The document also includes a set of supplementary annexes containing additional information and resources to support users in making informed, efficient, and strategic use of CC licenses.

Testing Methodology: For the development of this tool, a targeted questionnaire was distributed via the EU Funding platform. The survey included a series of specific questions designed to assess the usefulness of the tool and to identify users' expectations and needs regarding CC licensing.

A total of 50 participants from different sectors were invited to complete the survey, including representatives from TTOs, social sciences organizations, and academic institutions. Their feedback provided valuable insights for improving the relevance, usability, and scope of the tool, ensuring that it effectively addresses the needs of both academic and non-academic stakeholders.

Target User: This tool is intended for individual researchers in the social sciences and for staff within TTOs who support the dissemination and licensing of academic outputs.

User Access: Unrestricted

Tool 3. SSHA ('SHAPE') Licensing Kit

Reason for creation: This tool was created to help users understand the specific challenges of licensing SSHA assets compared with STEM outputs and to show how strategies such as Express Licensing can support effective and impactful licensing practices.

Description: This tool is intended to guide the user through the process of licensing IP / knowledge assets created within SSHA research disciplines. The tool will also be useful for informing the process of licensing of copyright materials, developed in STEM disciplines, for social impact: for example, where the intended use is in public health or education.

The tool can be used at any stage of the licensing journey including during IP triage / assessment phase to give the user a full picture of what licensing options are possible to support their route to market.

Testing Methodology: A draft version of this tool was shared with members of this project's Classical+ SIG and with other individuals active in creating impact from IP assets created in the SSHA sector. Alongside the tool, testers were sent a questionnaire for assessing how useful the tool was for supporting the user in understanding the processes of licensing these types of IP asset. The questionnaire allowed testers to provide feedback on the content, overall design and usability of the tool.

Four participants, whose roles spanned IP licensing and management in Technology Transfer Offices and Consulting companies completed the survey. Their feedback provided valuable insights for improving the usability of the tool, in particular informing the structure of the process guide section.

Target Audience: This tool is intended for both SSHA academics and staff working within TT / KT / KE offices who manage IP and knowledge assets created in SSHA research. The tool is aimed at users who are new to the area and those who have 1-2 years' experience in licensing SSAH.

User Access: Unrestricted

Tool 4. Guide on Artificial Intelligence (AI) Licensing and Risk Management Basics

Reason for creation: This tool was developed in response to the growing need to commercialise AI-based research projects across universities and partner organisations, and the challenges of licensing that such projects face. Many researchers and start-up teams can build promising AI components, but they lack a clear, practical route to handle data, code, and models from the very start of a project, and to connect those choices with legal and regulatory duties during translation to the market.

The aim is to help researchers and support teams, including technology transfer professionals, to plan early for ownership and contribution capture, data governance, provenance, and fit-for-purpose licensing. The guide brings together IP protection, open and hybrid licensing options, key contract checks, and baseline compliance steps under current EU rules, so that AI outputs can move from lab to real-world use in a sustainable and resilient way.

Description: The document provides a compact, end-to-end overview for teams that plan to create and license AI-enabled products in the EU. It is arranged along the product life cycle: early strategy and scoping; readiness checks on data, contributors, and risks; protection of results; compliance actions; routes to market; and post-market duties. The guide focuses on what to do, when to do it, and who should be involved. It explains key choices that shape licensing, then summarises practical IP options and the main EU obligations that affect release and distribution. The central chapters outline typical commercialisation patterns, fit-for-purpose licensing models, and basic contract checks. The closing section addresses monitoring, incident response, deprecation, and handover. The guide is supplemented with a set of references, tables and further reading recommendations.

Testing Methodology: A draft version of the tool was shared with legal professionals, technology transfer specialists, and machine learning engineers of a global software company to ensure its correctness, as well as the usefulness and convenience of the tool for representatives of various target groups. Among the testers were specialists with deep experience in legal aspects of AI projects, as well as those who had more general experience in technology transfer, licensing, or building applicable software solutions. Within them, two SIG members structured their expert insights and feedback in the provided feedback form. All other testers provided feedback in the form of written comments. Two participants of the testing also presented additional considerations as part of the oral

discussion. The feedback collected was systematically analysed, assessed for relevance and feasibility, and incorporated into the finalization of the tool.

Target Audience: Researchers, interdisciplinary project teams, spin-out founders, and KE/TT professionals involved in creating, evaluating, licensing, or deploying AI components; research managers and HEI administrators supporting these activities; and partner SMEs or public bodies working with academic AI assets.

User Access: Unrestricted

Tool 5. Guidelines on Geographical Indications for Craft and Industrial Products

Reason for creation: This tool was developed in response to the growing need among craft and industrial institutions to understand and adapt to new regulations concerning the protection of their products. Many organisations operating in this sector, producer associations, individual producers, and public or private bodies, require accessible guidance to navigate emerging IP frameworks, particularly those related to geographical indications (GIs). The initiative aims to support these stakeholders by providing clear, practical information that strengthens their ability to protect and manage their intellectual assets effectively.

Description: This document offers practical guidance to help craft and industrial producers identify their intellectual property assets and understand the available legal mechanisms for protection, with a specific emphasis on craft and industrial GI registration. It explains ordinary, direct, and non-EU registration routes and outlines key steps for effective IP management. The tool also serves as a reference for stakeholders seeking to enhance the visibility, authenticity, and market value of their products through appropriate IP strategies.

Testing Methodology: The content of this tool was reviewed through iterative feedback from IP experts and relevant stakeholders. Their insights helped ensure that the guidance is aligned with real sector needs, reflects practical challenges encountered during GI registration processes, and remains accessible to users with varying levels of IP knowledge.

Target Audience: The tool is intended for associations of craft and industrial products, single producers eligible for GI applications, public authorities and regulatory bodies, and private entities interested in protecting or promoting craft and industrial goods.

User Access: Unrestricted

Tool 6. Guidelines on Rights Clearance and Ownership

Reason for creation: These tools were developed in response to the growing need among GLAM institutions (Galleries, Libraries, Archives and Museums) to clearly identify the ownership of the materials they hold, manage complex clearance processes, and better understand how these steps enable future licensing opportunities. Many cultural institutions face challenges in determining rights status, tracing rightsholders, and managing permissions, issues that directly affect their ability to share, digitise, or commercialise their collections. This initiative therefore aims to provide practical, structured support to help institutions strengthen rights management practices and unlock the potential of their assets.

Description: These documents are two complementary tools designed to help GLAM institutions assess the intellectual property rights associated with their collections and carry out effective clearance procedures. It offers practical guidance for identifying rights holders, determining the IP status of works, documenting clearance actions, and understanding how these processes inform responsible licensing strategies. By clarifying ownership and rights conditions, the tool supports institutions in enhancing access, enabling reuse, and exploring educational or commercial licensing pathways within legal and ethical boundaries.

Testing Methodology: The content of these tools has been developed and refined through consultation with GLAM professionals, including rights managers, legal advisers, curators, archivists, and licensing professionals. Their feedback through the questionnaire has ensured that the guide reflects the real challenges faced by cultural institutions, remains applicable to different types of collections, and is accessible to users with varying levels of intellectual property expertise.

Target Audience: This tool is intended for a wide range of GLAM institutions, including museums, libraries, archives, galleries, heritage centres, and cultural organisations responsible for managing or licensing collection materials. It is aimed at administrators, curatorial teams, rights and reproduction officers, IP managers, legal units, and professionals involved in clearance, rights assessment, and licensing workflows.

User Access: Unrestricted

Tool 7. Guide for Classical Plus IP Licensing

Reason for creation: This tool was developed in response to the persistent undervaluation of SSHA outputs within traditional intellectual property frameworks. Despite their proven societal importance, validated surveys, behavioural games, methodological frameworks, curated datasets, longitudinal databases, educational materials, these assets are often treated as secondary by-products of research rather than as valuable public goods with significant civic and commercial potential.

The need for this tool emerged from the recognition that SSHA assets operate under different dynamics than classical IP (such as patents). They are non-rivalrous, widely reusable, and generate impact across public, civic, and commercial systems. However, institutions lack structured guidance on how to protect, license, and strategically steward these assets to maximise societal benefit, ensure equitable access, and enable innovative business models. This tool was therefore created to help institutions reframe their SSHA outputs as strategic IP assets capable of fuelling scalable social impact, interoperability, collaboration, and new revenue models.

Description: This tool provides a conceptual and practical framework for identifying, valuing, protecting, and licensing non-classical IP assets generated within the SSHA disciplines.

Testing Methodology: The development of this tool was informed by consultations with researchers, GLAM professionals, data managers, social science methodologists, and technology transfer practitioners.

Target Audience: This tool is intended for universities, research institutions, GLAM organisations, TTOs, researchers, policymakers, NGOs, and decision-makers involved in creating, managing, or reusing social science tools and non-classical IP assets.

User Access: Unrestricted

Tool 8. Guidelines on Business Models for GLAM Institutions

Reason for creation: This tool was developed to support GLAM institutions in understanding the range of licensing and revenue-generation models available to them. Many galleries, libraries, archives, and museums seek sustainable ways to leverage their IP assets but lack clear guidance on how different business and licensing models, such as freemium access, commercial and non-commercial licences, memberships, sponsorships, partnerships, or crowdfunding, can be implemented in practice. The tool was therefore

created to help institutions evaluate these options and select models that align with their mission, resources, and strategic objectives.

Description: This document provides an overview of the different business and licensing models that GLAM institutions can adopt to generate value from their IP assets while maintaining cultural and public-interest responsibilities. It explains how models such as freemium access, commercial vs. non-commercial licensing, membership-based services, sponsorship and partnership frameworks, and crowdfunding initiatives can be integrated into institutional strategies. The tool offers practical guidance on how each model works, the types of IP assets that can be leveraged, and the potential benefits and limitations for cultural organisations

Testing Methodology: A questionnaire was distributed to a range of GLAM professionals, including administrators, rights managers, curators, and legal advisors. to assess their needs, challenges, and familiarity with business and licensing models. The feedback received was used to refine the structure and content of the tool, ensuring that the final version is practical, intuitive, and aligned with the operational realities of cultural institutions. This iterative consultation helped create a more user-friendly resource that directly addresses common sector challenges.

Target Audience: This tool is intended for galleries, libraries, archives, museums, and other cultural institutions seeking to explore or develop business models based on their IP assets. It is especially relevant for administrators, financial planners, licensing officers, IP managers, digital strategy teams, fundraising units, and professionals involved in revenue generation, partnerships, or licensing strategy.

User Access: Unrestricted

2.2.2 Crisis Scenario

The Crisis section of the toolbox is designed to address situations where either:

i) access to new technologies is needed **rapidly** to address **unforeseen** emergencies, such as a global pandemic or a natural disaster; or

ii) lack of **equitable access** to existing technologies is creating or prolonging a crisis that could otherwise be prevented e.g. when fully developed medical treatments cannot be accessed by some groups due to their price or are simply unavailable in some parts of the world.

This section of the box is separated into:

Compulsory licensing (CL): when a government or their agent is able to offer rights to a third party and set the terms and conditions e.g. to ensure sufficient supply of a drug.

Voluntary licensing (VL): when the rights holder sets the terms and conditions.

The diagram below shows how the various Crisis tools are logically structured between VL and CL, and how VL can then be further sub-divided into **rapid voluntary licensing** for **unforeseen** crises and **planned equitable access** for **preventable** crises. Tools for planned equitable access are further subdivided into **resources for PROs** and **resources for Funding Agencies and Policy Makers**.

The Crisis tool-kit is composed of **12 main tools** as well as a library of documents and a number of examples of executed licensing agreements. It is shown below.

Key to document type

Denotes original IMPAC3T IP Tool

Denotes existing but updated public resource/ publication

Denotes existing but updated public resource/ tool

Denoted publication

Detonates executed and published licensing agreement

The various tools from the Crisis Tool-box are described in more detail below.

1. Licensing for Crisis: Voluntary and Compulsory Licensing

Tool 9. FAQ Fact Sheet and Literature Review

Reason for Creation: To explain and illustrate the main issues in the two forms of licensing, (CL and VL) with a particular emphasis on recent (2020 +) use for medical technologies. To offer an overview of some relevant literature, allowing the reader to identify relevant sources and more detailed documents on specific topics.

Tool Description: The document is laid out as a series of frequently Asked Questions (FAQs) with each answer being linked to more detailed publications that can be found in the Bibliography.

Testing Methodology: Reviewed by members of the Crisis SIG and stakeholders from the wider target group. Updated based on written feedback and discussions.

Target Audience: This document is aimed at policy makers who are new to the issues of CL and VL and those involved in technology transfer who want to get a balanced over-view of the topic. Assumes a degree of knowledge of licensing practice and law.

User Access: Unrestricted.

Tool 10. Compulsory (CL) and Voluntary Licensing (VL) Illustrative case Studies

Reason for Creation: To illustrate the range of approaches that have been used to make technologies available in times of acute crisis

Description: Three case studies designed to illustrate the use of different types of licenses that have been used to make technologies available in recent times of acute crisis.

Testing Methodology: Reviewed by members of the Crisis SIG and stakeholders from the wider target group. Updated based on written feedback and discussions.

Target Audience: aimed at policy makers and those involved in technology transfer who are relatively new to the subject and would like to see more examples of how CL and VL have been applied in the past and the implications for future use. Assumes a degree of knowledge of licensing practice and law.

User Access: Unrestricted.

2. Compulsory Licensing (CL)

Tool 11. CL Resource library

Reason for Creation: To gather together recent publications that cover many of the main issues to be understood and addressed in CL.

Description: The resource contains 10 publications that cover many of the main issues to be understood and addressed in CL:

1. Compulsory licensing in Europe
2. Scope of Compulsory License and Government use of Patented Medicines in the context of the Covid-19 Pandemic
3. Compulsory Licenses during the Covid-19 Pandemic: A European and International Perspective
4. Compulsory licenses, the TRIPS Waiver, and access to COVID-19 medical technologies

Tool 1. Compulsory Licensing of Patents During Pandemics

6. Compulsory licensing of trade secrets: ensuring access to COVID-19 vaccines via involuntary technology transfer
7. Pros and Cons of Compulsory Licensing: An Analysis of Arguments
8. Compulsory licensing of patents for crisis management On the European Commission's proposal to create a new EU-wide compulsory licensing regime
9. EC Impact Assessment Report on the Proposal for a Regulation of the European Parliament and of the Council on compulsory licensing for crisis management and amending Regulation (EC) 816/2006
10. On the European Commission's proposal to create a new EU-wide compulsory licensing regime

Testing Methodology: N/A

Target Audience: aimed at policy makers and those involved in technology transfer who wants a better understanding of how this field has been developing in terms of both policy and practice.

User Access: Unrestricted

3. Voluntary Licensing (VL)

Rapid voluntary licensing

Tool 12. A Checklist for Voluntary Licensing of pharmaceutical drugs

Reason for Creation: to share good practices and help the owners of intellectual property rights (IPR) to engage more confidently in voluntary licensing in times of crisis or emergency, particularly when engaging with the MPP (Medicines Patent Pool).

Description: This document is based strongly on the **Report of the Task Force on Voluntary Licensing and Access to Medicines** produced by a team under the Global Access in Action initiative, Version 1.1 April 22, 2023 See https://globalaccessaction.org/vlam/ This report was based strongly on licenses agreed with the MPP that are automatically placed in the public domain. See https://medicinespatentpool.org/progress-achievements/licences

The 11 Good Practice Recommendations draw on a record of successful deployments of VLs and as such are grounded in a substantial body of Customary Practice (CP). For further

recommendations related to VL that require stronger involvement of stakeholders including governments and donor agencies, the reader is invited to consult the analysis and recommendations of the original report.

Additional comment and references have been added by the IMPAC3T IP team including examples of four executed licenses from the Medicines Patent Pool that are discussed in the text.

Testing Methodology: Reviewed by members of the Crisis SIG and stakeholders from the wider target group. Updated based on written feedback and discussions.

Target Audience: Aimed at TTOs, enterprises and licensing professionals who may be setting up and assisting in a rapid voluntary license to respond quickly to an external emergency including engaging with the MPP (Medicines Patent Pool).

User Access: Unrestricted.

Good Practice with Medical Devices

Tool 13. Rapid Voluntary Licensing: A Good Practice guide for Medical Devices

Reason for Creation: The share emerging good practice gained during the Covid-19 pandemic to support TTOs to bring technology rapidly to where it is needed without compromising on safety and regulatory issues.

Description: The guidelines are designed to highlight the main issues to be considered in a Rapid Voluntary License with particular emphasis on **medical devices**. They are based on materials in the public domain and in particular two contrasting ventilator licenses. The guide highlights the main clauses that need to be particularly carefully considered. It includes and makes direct reference two executed licenses that are referenced in the text:

UCL-Ventura Licence1

Stanford Open-Source Ventilator License2

The guidelines can be read in conjunction with the Report of the Task Force on Voluntary Licensing and Access to Medicines Checklist for Voluntary Licensing (see above).

Testing Methodology: Reviewed by members of the Crisis SIG and stakeholders from the wider target group. Updated based on written feedback and discussions.

Target Audience The main target readership is organisations directly involved in technology transfer, (both Public Research Organisations and commercial enterprises) who may need to negotiate such a license in the future.

User Access: Unrestricted

Planned Equitable Access

Tools for PROs

Tool 14. Embedding EA in Policy and Practice FAQ for PROs

Rational for Creation: To support universities and research institutes who are considering adopting a policy on equitable access and want to better understand the issues.

[1] Contact: https://www.ucl.ac.uk/healthcare-engineering/research/ucl-ventura-breathing-aids-covid-19-patients/accessing-ucl-ventura-cpap-internationally

[2] Available online at http://openvent.stanford.edu/license.pdf

Description: This document is laid out as a series of 15 FAQs on how and why PROs might consider introducing and implementing Equitable Access into their institution at the level of policy and practice. It contains active links to publicly available illustrative examples to support understanding of the issues.

Testing Methodology: Reviewed by members of the Crisis SIG and stakeholders from the wider target group. Updated based on written feedback and discussions.

Target Audience: Designed for technology transfer staff, university management and researchers who are approaching the issues for the first time or who are preparing to review and revise a policy.

User Access: Unrestricted

Tool 15. Guidelines for Research Organizations on embedding Equitable Access to health-related technologies into policy and practice

Reason for Creation: To support research organisation to develop and adopt or revise existing policy and practice to support more equitable access[3] to health-related technologies through licensing of their IP assets.

Description: laid out as a practical guide over 11 chapters the guidelines cover the rational for adopting a policy, the questions to be addressed with stakeholders, the process of development and consultation and ultimately the details that may need to be inserted into the policy itself or adopted into a license that reflects the policy. Examples of how other organisations have approached the issue as well as publicly available examples are used to illustrate differing perspectives and approaches by peer organisations. The guidelines conclude with a description of other resources that will support policy adoption including the UAEM Global Access Licensing (GAL) Framework and associated tool-kit, ATAF (Equitable Technology Access Framework) and the AUTM Global Health Toolkit including example policy and bank of licensing clauses.

The guidelines were developed based strongly on discussions with stakeholders in Europe and the USA including HEIs, Research Institutes, TTO staff, student lobbing bodies including UAEM (Universities Aligned for Essential Medicines) and the MPP (Medicines Patent Pool).

The guidelines can be read in conjunction with the other tools in the IMPAC3T IP 'Crisis' tool kit and specifically the FAQs, Fact Sheet on Compulsory and Voluntary Licensing and associated case studies. This is indicated in the tool.

Testing Methodology: Reviewed by members of the Crisis SIG and stakeholders from the wider target group. Updated based on written feedback and discussions.

Target Audience: The main target readership is senior managers and implementing staff who are considering introducing or strengthening their policy towards making access to their licensed technologies more available and affordable, particular to lower- and middle-income counties (LMIC). They may also be useful to researchers and undergraduates seeking a better understanding of the purpose and execution of Equitable Access policies and policy makers, including those with responsibility for managing research funding, seeking a better understanding of the challenges facing PROs who take this step.

User Access: Unrestricted

[3] For the purposes of this document, Equitable Access to heath related technologies is defined as making them **available and affordable**, particularly with respect to Lower- and Middle-Income Countries (LMIC).

Existing EA tools that have been revised and updated

The tools below have been previously developed and tested by other groups to support the Equitable Access framework and approach. Permission has been sought and secured by the rights holders to both update them and to include then in the IMPAC3T IP tool-kit.

Tool 16. Equitable Technology Access Framework (ETAF 2021)

Developed by the UAEM (Universities Allied for Essential Medicines) group this framework lays out goals, and general principles for universities to adopt along with modalities of technology transfer and corresponding strategies to support Global Access to their research.

It replaces an earlier version of the document namely the GAL framework (2009) see below.

Tool 17. GAL (UAEM) Tool-kit

Promoting global access to health technologies: A licensing toolkit for public sector institutions. This very comprehensive toolkit offers a set of licensing provisions and terms that can be utilized by public sector institutions, including funding agencies, universities, and research institutes, and included in license agreements with industry partners to ensure access and affordability of resulting health technologies in the developing world.

Originally produced for UAEM. Updated by IMPAC3T IP in 2025 with the cooperation of the original author

Tool 18. AUTM Good practice clause bank

A non-exhaustive set of examples of verbatim clauses related to global health issues, as extracted from license agreements successfully executed by U.S. universities.

The clause bank was originally established by AUTM in 2009 and updated in 2012. IMPAC3T IP updated the 2012 revision in 2025.

Tool 19. Early Action for Equitable Access: Protecting access to Medicine in University Licensing (UAEM 2024)

Recent UAEM White Paper (2024). Examines current licensing practice in the context of the ETAF (see above) and proposes an FOI (Freedom of Information) advocacy toolkit.

Tools for Funding Agencies and Policy makers

Tool 20. Embedding EA in Policy and Practice: FAQ for Funding Agencies

Rational for Creation: To support research funding agencies to embed requirements for equitable/ responsible access into their funding schemes to support broader societal and economic impact.

Tool Description: This document is laid out as a series of FAQs on how and why funding agencies might consider introducing and embedding Equitable Access into their funding instruments and grant schemes including monitoring and evaluation of outcomes and impact. It is intended to serve as an introduction for those managing grant funding instruments who are considering introducing EA to the schemes

Testing Methodology: Tested by stakeholders from the European Funding ecosystem including the European Commission. Revised based on written feedback and discussions.

Target Audience: Policy makers and implementing research funding agencies.

User Access: Unrestricted.

2.2.3 Co-Creation Scenario

The "Co-Creation" scenario marks a fundamental transformation in the innovation process, shifting from traditional, organisation-led approaches toward more collaborative, stakeholder-driven models. In this context, the heart of co-creation is always a team consisting of members from multiple organizations such as companies, universities, and funding organisations. Other organizations, informal association or individuals of different motivations might participate in co-creation with varying degrees of involvement.

One of the main features of this scenario is that co-creation is often assumed to be always formulated as some kind of project with clear start and end points. The co-creation process usually includes end-users, customers, policymakers or other stakeholders in the development work. However, they are often only engaged to be the core co-creation team for some specific activities or some specific period. Thus, when a standard practice is to share the resulted IP between the core team or waive/signed it to some of core co-creation participants (organizations). In some cases, where the contribution of non-core team members is significant or highly sensitive, a different distribution of intellectual property may be possible. Furthermore, it should be noted that an agreement to waive intellectual property rights for non-core/third-party co-creation members may provide compensation for their contributions in the form of acknowledgment, recognition, or a symbolic material benefit.

Co-creation enables knowledge, insights, and creativity to flow in multiple directions, harnessing collective intelligence to produce more meaningful, relevant, and impactful outcomes. This model encourages innovation that is grounded in real-world needs and shared ownership, increasing both the relevance and sustainability of solutions.

To support this dynamic and multi-stakeholder environment, a set of tools has been developed specifically for the Co-Creation scenario. Each tool is further detailed in the subsequent sections, outlining its purpose, development process, and practical application within co-creation-driven innovation ecosystems.

Often, co-creation is used as the first phase of development to explore the topics and create the first pieces of IP (usually concepts, demonstrators, early-phase prototypes). Co-creation works extremely well in pre-competitive or public development, as the different shared IPRs models can be utilised more freely between the participants.

The tools created for the co-creation scenario focus heavily on getting the team aligned behind a common goal and ensuring the possibility for further development by the represented parties at a later stage. More than one licence may be needed at the different phases of development. Co-creation tools need to ensure that different types of licenses can be effectively deployed.

Communication inside the co-creation team is one of the most critical differences between successful and unsuccessful co-creation projects, and this is highlighted in many of the tools. The most important metric for this kind of co-creation is whether some of the results progress to further development, and ultimately to actual solutions (products, services, patents, etc.).

To address the multifaceted nature of co-creation, this section is divided into two complementary parts: **Company-benefits aimed co-creation** and **Societal-benefits aimed co-creation**. It should be noted that this division is quite conditional. These sections are in many ways mutually complementary, since both societal-benefit co-creation can be initiated by the company / group of companies aiming in further development their portfolio, and no successful implementation and introduction into practice of the results of societal-benefits aimed co-creation is possible without a financially-interested beneficiary(s) as only business considerations and clear profit models might make them resilient and long-term active.

The following tools are developed to support the communication between the co-creation members, clarify and agree on the rules of co-creation (IPR, rewards and licensing), and to analyse the co-creation results and individual competences to enable further development.

2.2.3.1. Company-benefits aimed co-creation

Tool 21. Agreement framework and model tools

Reason for Creation: This tool was specifically requested during the initial SIG discussions and case studies. Co-creation setup requires a different approach in agreement frameworks compared to, for example, traditional subcontracting models. Also, the co-creators or stakeholders are rarely experts in legal topics, and the processes lack interaction and deep understanding of why the legal framework is built the way it is.

Traditional collaboration contracts often fail to capture the dynamic, shared-ownership nature of co-creation. This tool aims to translate complex legal and IPR issues into accessible, structured guidance. It gently forces the co-creation parties to talk about their concrete goals in the project, purpose of the co-creation and reveal the possible use cases for the results right in the beginning. This is too often overlooked in the early stages of co-creation and leads to situations where for example:

- High-quality results are not taken forward because the ownership of the intellectual property rights is not clear
- Development is slowed down or blocked because the use of background material is not agreed before-hand
- Co-creation parties start to hide information or ideas because there's not enough trust or understanding of different motivations in the co-creation project

Description: The Agreement Models and Frameworks tool provides a structured guideline for establishing clear and fair agreements among stakeholders in co-creation projects. It helps define roles, responsibilities, and IPR among participating organizations, ensuring transparency and trust in multi-party innovation settings. The tool recognizes that co-creation differs from traditional collaborations, it aims not for a finished product but for jointly developed ideas, prototypes, and knowledge that can be independently developed further by each participant.

Specific Methodology for the Tool: The draft version of the tool was tested among 8 experienced co-creation facilitators and 15 beginner co-creators. Feedback received highlighted the importance of using the tool as early interaction point between the potential co-creation parties. It seemed to clear out many mislead assumptions and motivations among the co-creation parties. On the other hand, many commented that after utilizing the tool and agreeing on the basic components of the co-creation agreement, the users should consult legal experts to write the agreement to avoid unclear or misleading terminology.

After receiving the feedback, is was decided to develop a canvas as part of the tool to be used for facilitating the discussions and further strengthening the interaction value before the concrete co-creation has started.

Target Audience: This tool is designed to support key actors involved in collaborative innovation. It serves innovation facilitators who lead co-creation projects and need clear guidance to align multiple stakeholders. It also benefits companies, startups, and/or research institutions engaging in joint development, providing a structured basis for fair and efficient collaboration. Legal advisors can use it to draft or review co-creation agreements with greater clarity, while project coordinators gain a transparent and standardized framework for managing collaboration terms. Additionally, it offers value to public innovation ecosystems seeking balanced approaches to shared development and commercialization.

User Access: Unrestricted

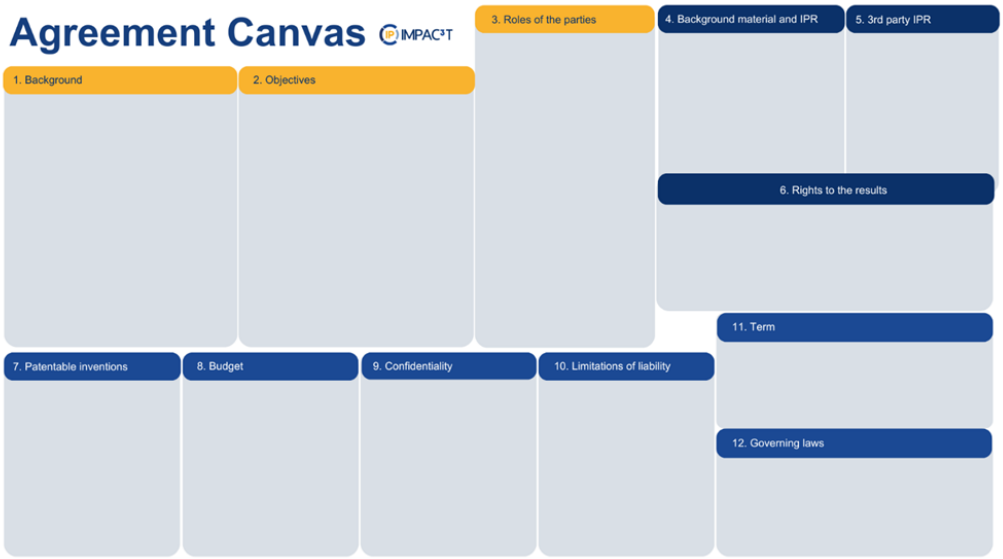

Figure 1: Canvas for the "Agreement frameworks and models" tool

Tool 22. Co-creation participant's guide

Reason for Creation: Most of the individuals in co-creation teams are, unfortunately, first-timers when it comes to co-creation. There is a clear need for an easy, brief guide to help first-timers to avoid the most common pitfalls and accelerate especially the start of the co-creation journey. use of this tool will increase the quality of the teamwork and results, which positively impacts the further development of intellectual property.

The main aim of the Co-creation Participant Guide is to empower individuals to perform effectively in co-creation teams by providing:

- A clear understanding of co-creation principles, emphasizing curiosity, empathy, openness, and learning through iteration.
- Guidance on mindset and teamwork, helping participants navigate uncertainty and diverse perspectives.
- Practical tools to plan, implement, and validate co-created solutions.
- Support for self-reflection, ensuring participants grow their competences and confidence through the co-creation journey.

Ultimately, the guide helps transform participants from passive contributors into active co-creators who drive their projects forward collaboratively and responsibly.

Description: The Co-creation Participant Guide is a practical handbook designed to help individuals participating in co-creation projects understand how to work effectively within diverse, interdisciplinary teams. It focuses on mindset, principles, teamwork, and process — ensuring that every participant can contribute meaningfully and navigate the challenges of collaborative innovation.

The guide introduces participants to:

- The fundamentals of co-creation and why it differs from traditional collaboration.
- Tools and canvases that support motivation mapping, process design, ideation, validation, and reflection.

- Best practices for communication, trust-building, and learning from uncertainty.

It supports co-creators in aligning personal goals with project objectives, establishing transparent collaboration, and maximizing learning and results through structured processes.

Testing Methodology: The Co-creation Participant Guide was tested with the intended target user group, e.g., 9 first-time co-creators in interdisciplinary teams. The feedback was gathered through feedback discussions after the novice co-creators had 1-2 weeks to get familiar with the document and start their own co-creation journey.

The feedback applauded the fairly simple structure and concrete topics to specifically focus on when starting their co-creation journey. On the more constructive side, a few people commented that it would be better to have the full co-creation experience behind them to reflect better on the usefulness of the guide.

One of the more unexpected values that were highlighted was the expectation management that can be achieved with such guide. The co-creators commented that it helped them to prepare mentally for the later stages of the project through the different canvases and checklists provided in the tool.
As a results, we highlighted the more in-depth tools developed during the IMPAC3T project to give deeper context and tools for the most motivated co-creators.

Target Audience: In this tool the target audience is simple; first-time co-creators. Most of the people embarking on co-creation activities, have little or no previous experience. By focusing on the individuals, we believe you can improve the quality of the results and iron out the most basic challenges in typical co-creation projects (like communication, coping with uncertainty, tools & processes).

For co-creation facilitators there is probably nothing especially new, but this guide can act as the “handbook” for them as well.

User Access: Unrestricted

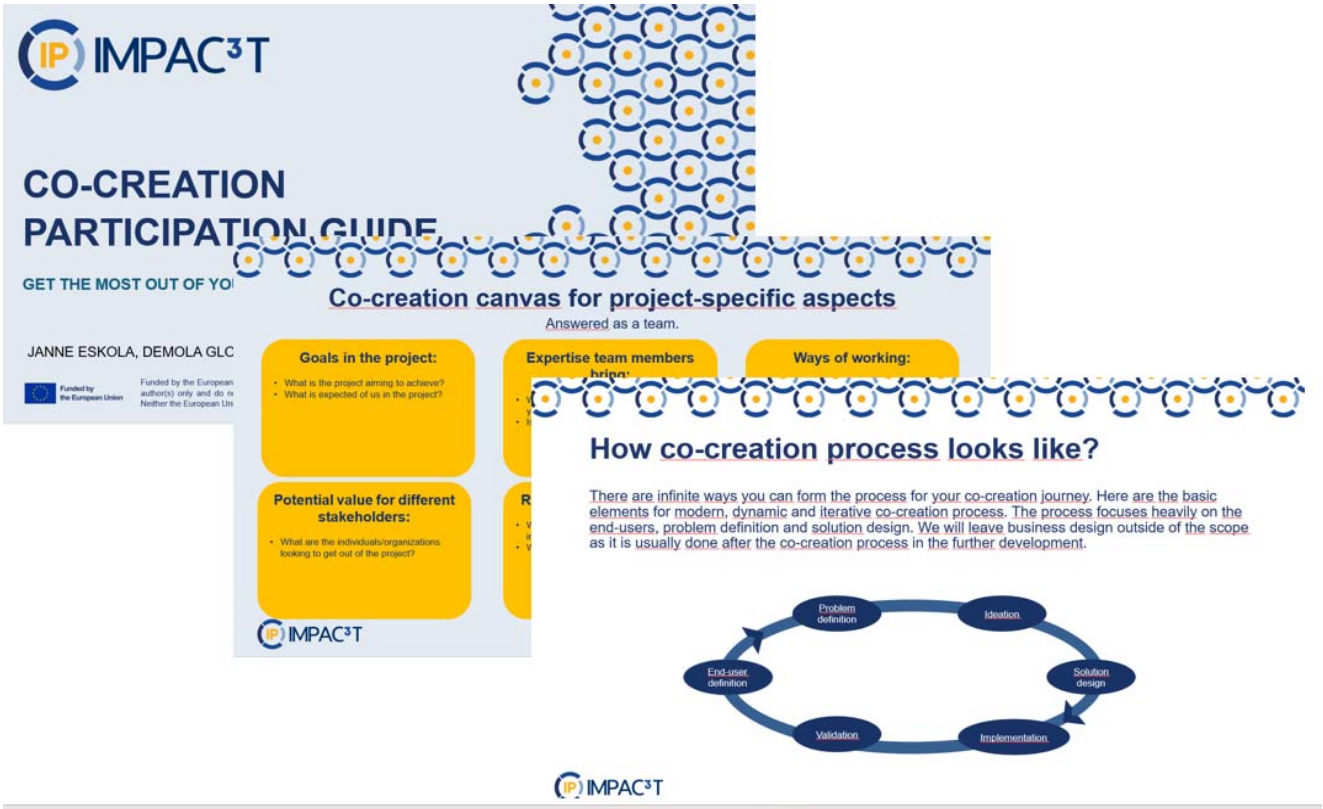

Figure 2: Examples of how the Co-creation Participant Guide looks like

Tool 23. Co-creation team competence assessment tool

Reason for Creation: As co-creation is often chaotic and uncertain, the co-creation teams and stakeholders need tools to clarify what is feasible within their project scope and what kind of additional resources would be beneficial for the teams. Often stakeholders who are not directly associated with the daily development have resources and expertise to offer but lack the knowledge of what might be needed and when. Co-creation teams rarely have the time or natural willingness to analyse their team's capabilities compared to the task at hand.

The main aim of the Co-creation Team Competence Assessment Tool is to:

- Expose the gaps in the team's competencies vs. the project needs: what kind of support and resources are needed to elevate the quality of the expected results?
- Support team development by identifying collective strengths and challenges in collaboration, creativity, and communication.
- Guide facilitators in tailoring feedback and mentoring efforts based on competence gaps or team-level patterns.

In essence, the tool enables the team to compare their own evolving skills to the needs of the project goals.

Description: The *Co-creation Team Competence Assessment Tool* is a structured framework designed to help assess the skills, attitudes, and learning progress of individuals and teams engaged in co-creation projects. Often in co-creation it is hard to anticipate the future needs of the team, especially when considering the further development of the results after the co-creation phase has concluded.

The tool supports the evaluation of how team members contribute to collaborative innovation, focusing on competencies critical for co-creation success such as communication, creativity, teamwork, problem-solving, and openness to learning.

The tool provides team-level assessment of the different skills and competencies in within the team versus the anticipated requirements of the project context and goals. It enables participants to reflect on their own development and collective team dynamics, thereby helping organizations and co-creation teams themselves to identify strengths, future development paths and potential additional resource needs.

Testing Methodology: The draft version of the tool was tested among 7 active interdisciplinary co-creation teams. The feedback suggested the tool was challenging to use because of the width of the competencies evaluated. The format of the tool (Excel) was questioned.

As a result of the testing feedback the number of competencies evaluated was reduced from 30 to 23. However, we still believe that in order to get value out of the assessment, the competence evaluation needs to be wide enough to expose the potentially lacking areas and display the strengths.

Regarding the format, two other formats were discussed; canvas and online assessment tool. The canvas option was disqualified because it makes the user experience too manual when it comes to the analysis of the results. The challenge with online tool is that the users said it brings up data protection issues and limits the willingness to use it. With the current format the users can decide how they want to distribute the file or just use it locally.

Target Audience: This tool is built for those embarking on the co-creation journey. It also guides organizations that are progressing through the full co-creation process. It also equips facilitators who accompany these teams, providing structure and resources to help them navigate each step successfully.

User Access: Unrestricted

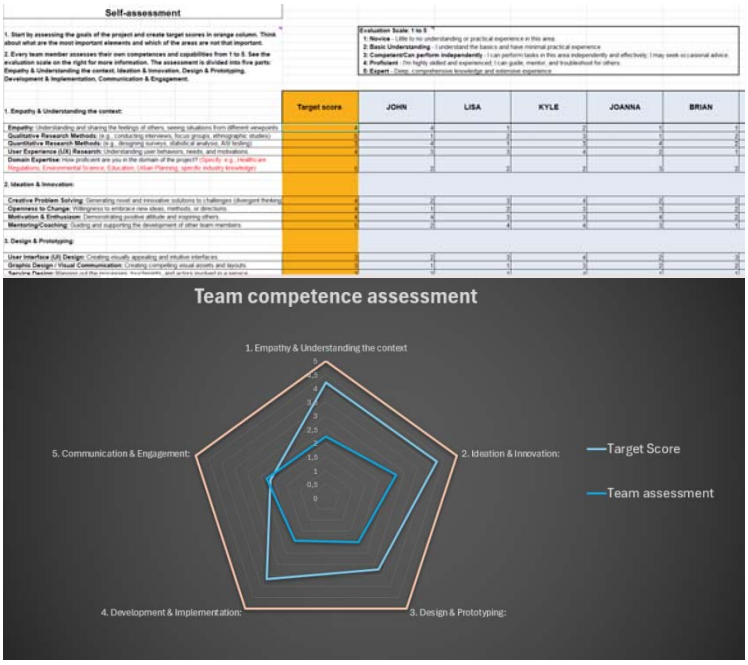

Figure 3: Co-creation team competence assessment tool

Tool 24. Co-creation results analysis tool

Reason for Creation: Co-creation Results Analysis Tool was created to help co-creation teams and stakeholders to analyse the all the results they have created and categorize them. Often in early-phase co-creation projects the focus is only on the results that directly answer the goals and needs of the initial project setup. Still, lots of other potentially valuable insights, ideas, concepts and demos are usually created. This tool will give broader look into the results and ensures the team is not missing out on opportunities after the co-creation project has ended. This will increase the chances for valuable intellectual property identification and ultimately patenting and licensing.

The primary aim of the Co-creation Results Analysis Tool is to create a structured approach to understanding and prioritizing the outcomes of co-creation projects. Specifically, it aims to:

- Capture all project outputs (tangible and intangible) in a transparent, comparable way.
- Support strategic decision-making about which results hold the greatest potential for future development or dissemination.
- Facilitate collective reflection within the co-creation team, strengthening shared understanding and ownership of results.

Ultimately, the tool bridges the gap between co-creation activity and actionable next steps, ensuring that valuable results are recognized, developed, and leveraged effectively. This is one of the key moments when thinking about IP creation and ultimately creating licensing opportunities out of co-creation projects.

Description: The Co-creation Results Analysis Tool provides a structured, step-by-step framework for identifying, categorizing, analysing, and prioritizing the outcomes of co-creation projects. It helps teams transform raw project results into actionable insights by systematically assessing both tangible and intangible outputs.

The tool ensures a comprehensive understanding of what was created during the co-creation process, from prototypes and reports to enhanced collaboration, knowledge, and social impact, and supports informed decision-making on which outcomes should be developed further, utilized, or shared.

Testing Methodology: The draft of the tool was tested by 3 co-creation teams at the end of their co-creation project. The feedback highlighted the importance of open discussion about the findings and concrete results, as many individuals commented they realized something new about their project outcomes during the testing. The testing would have been more comprehensive if taken a bit further by analysing how did the results analysis affect the further development of the results.

As a result of the feedback and discussions, we condensed some of the information in the tool to be more direct and faster to use.

Target Audience: This tool is designed for a target audience directly involved in collaborative projects. It supports co-creation project facilitators and coordinators responsible for managing multi-stakeholder innovation processes, helping them navigate complexity and structure collaboration. It also serves project teams and participants seeking to reflect on outcomes, impact, and learning throughout their work. In addition, it is relevant for innovation program managers within universities, research institutions, or public-sector initiatives who oversee co-creation efforts. Finally, it provides value to decision-makers evaluating which co-creation outputs to advance into R&D or commercialization, offering clarity to guide strategic choices.

User Access: Unrestricted

Tool 25. Co-creation continuation opportunity mapping

Reason for Creation: The main need for the tool stems from the inability of the co-creation teams to make decisions about the next steps after their co-creation journey has ended. This happens often due to the varied backgrounds of the co-creators and their different point of views to approach further development. This very simple tool helps to facilitate the discussions between, for example, people from academia and industry.

The aim of the Co-creation Continuation Opportunity Mapping Tool is to guide teams in identifying and planning the most suitable continuation path for their project results, ensuring long-term impact and ownership. Specifically, it helps teams to:

- Evaluate motivation and capabilities for further development.
- Identify competency gaps and external support needs.
- Choose the most feasible continuation path based on strategic fit, resources, and goals.
- Define clear next steps, responsibilities, and timelines for moving forward.

By making the continuation planning process structured and transparent, the tool fosters accountability, shared commitment, and practical momentum beyond the project's lifecycle.

Description: The Co-creation Continuation Opportunity Mapping tool helps teams explore and decide the most suitable pathways for continuing and scaling the results of their co-creation projects. It builds directly on the insights from the Co-creation Results Analysis Tool (Tool 5), guiding teams from reflection to concrete post-project actions.

Through a structured, visual, and collaborative process, the tool assists in assessing team motivation, available competencies, and external needs. It presents four main continuation paths, Joint Venture, Startup, Academic Research, and Product/Service Development, each with clear criteria, key considerations, and next-step planning.

The goal is to ensure that promising ideas and results from co-creation don't fade after project completion, but rather evolve into tangible innovations, research, or organizational development outcomes.

Testing Methodology: This simple tool/guide was tested with 3 co-creation teams who had ended their journey. The testing was conducted through observation (observing teams using the tool) and discussion after the testing. The main feedback received was that for many of them just presenting the four main continuation paths created value-adding conversations regarding the motivation to continue to develop the results further. The teams also mentioned they appreciated the conciseness of the tool; it facilitated the discussions but didn't have too many steps.

Target Audience: This tool is intended for co-creation teams completing their projects and exploring next steps, offering guidance as they transition beyond initial outcomes. It is also aimed at facilitators supporting innovation continuation planning

User Access: Unrestricted

Tool 26. Market opportunity evaluation tool

Reason for Creation: In the case studies there was a tendency of co-creation teams not fully understanding the future use cases or market needs. This was often leading the co-creation teams to focus too much on technology development without a clear understanding of who they are designing the solutions for. This leads quickly into the common "we lots of solutions looking for problems" situation and further development of the IP is restricted or slowed down.

The aim of the Market Opportunity Evaluation Tool is to guide co-creation teams in systematically understanding and validating the potential of their innovations in real-world contexts.

It aims to:

- Facilitate strategic discussions around opportunity readiness and value creation.
- Support evidence-based decision-making for go/no-go or prioritization choices.
- Encourage foresight and trend awareness by considering future markets and emerging niches.
- Foster shared understanding and alignment among diverse partners about what makes an opportunity viable and impactful.

Description: The Market Opportunity Evaluation Tool is a structured framework for assessing the potential of co-created results and innovations in terms of their market and strategic value. It supports co-creation teams, business developers, and R&D professionals in analysing opportunities for further development, commercialization, or licensing.

Rather than serving as a rigid scoring system, the tool functions as a strategic dialogue framework — prompting reflection, discussion, and alignment among project stakeholders. It contains around 30 guiding questions organized across key dimensions such as market potential, customer needs, competitive positioning, scalability, and timing.

The accompanying Excel tool provides a systematic evaluation format, enabling teams to document their reasoning and track evolution of opportunity assessments across different project stages.

Testing Methodology: This tool is geared towards a slightly more advanced user. Thus, it was tested among co-creation and startup specialists (in total 7 people). The feedback pointed out that the rather than using the questions rigidly in order, the tool works well if used in much freer format. The questions themselves are important, but depending on the context

of the project. The specialists said they would use this as a checklist for co-creation teams to keep the focus on the value-adding topics and making sure none of the most important and crucial point of views are missed.

According to the feedback received, the original feature of scoring the different areas of development was removed and the tool was made into more of a checklist and discussion facilitator tool.

Target Audience: This tool is designed for co-creation teams seeking to explore commercialization or impact pathways for their results, providing support as they evaluate how their outcomes could create value beyond the project. It is also intended for facilitators to help the co-creation teams focus on the most value-adding topics, guiding their attention toward areas with the greatest potential.

User Access: Unrestricted

Tool 27. Co-creation Competence Assessment Tool

Reason for Creation: Many of the case studies created earlier in the IMPAC3T project indicated the challenges of identifying individuals to recruit from the co-creation teams. Good results might be a collaborative effort or the results of very bright individuals in the team. As the “soft skills”, like communication, teamwork and empathy, are increasingly more important than the traditional hard skills in companies, there was a clear need for tool to map those skills and create a standardized profiles for the co-creators.

Description: The Co-creation Competence Assessment Tool is a structured evaluation and reflection instrument designed to measure and support the development of key competencies required for successful participation in co-creation processes.

It helps both individual participants and teams assess their skills, attitudes, and collaborative behaviours that contribute to effective innovation, learning, and shared value creation.

The tool identifies and evaluates core co-creation competences such as:

- Teamwork and collaboration
- Communication and openness
- Creativity and problem-solving
- Adaptability and resilience
- Empathy and optimism

It can be used both as a self-assessment tool and as a facilitator-guided evaluation framework, enabling the tracking of competence development across different co-creation projects or over time.

Testing Methodology:

Testing was conducted as part of Demola co-creation project cohort for 10 teams during summer 2025. The team members conducted a self- and peer-evaluation for their co-creation team members. The feedback was positive thanks to a fairly simple framework but focusing on general co-creation skills and not the “usual” hard skills that the team members had been used to. It provided them a totally new perspective on themselves and their professional profile.

Target Audience: This tool is designed for Co-creation participants — students, researchers, entrepreneurs, and professionals engaged in collaborative innovation projects.

It also assists companies and organizations looking to recruit the best professionals based on their practical skills and soft skills.

User Access: Unrestricted.

Tool 28. IP Management Configurator for the Company-cored Projects with Co-creation Component

Note: This provisional tool was ultimately not included in the final toolbox

Reason for Creation: The configurator was designed to help organisations to structure decisions on how to manage the participation of individuals in the co-creation process and align expectations. The aim was to give an instrument to decide what kind of contract should be suggested and what kind of benefits would be optimal to those who waive their rights for the result of co-creation activities, depending on the nature and way of interaction with an individual.

Description: The configurator was made in a form of questionnaire where, depending on the answers, the user gets recommendations on how to organize the work with an individual participant(s). It expanded the experience of companies that actively involve product-users or individual experts, both individually and in groups, for product development and marketing activities, into a wider range of co-creation activities, including company-centred projects involving public, patients, volunteers, citizens, and individual researchers, as well as to support start-ups and SMEs dealing with individuals and lacking legislative support.

Testing Methodology: For the purpose of testing TTO professionals, SME consultants, start-up representatives, federal government officers responsible for societal programs, and collaboration between universities, start-ups, and individuals, as well as for different university management and development specialists, were invited to provide reviews and comments for the tool in the form of a questionnaire (located in Google Forms) and an explanations how the tool could be used. The response was very low, and in several cases, potential reviewers refused to provide detailed feedback after looking at the tool. As a result, we've got very contradictory comments, including positive feedback with useful comments from the project SIG member, as well as a set of written and oral comments on the low relevance and lack of value of the tool from some other testers. As a result, a decision was made to abandon further development and refinement of the tool and exclude it from the toolbox.

Result of testing: Based on the testing outcomes, the decision was made to discontinue further development of the configurator and exclude it from the final toolbox. This was due to (i) the very limited potential audience for the tool, which showed almost no overlap with the target audiences of the IMPAC3T IP project; (ii) predominantly negative feedback pointing to the tool's lack of usefulness, simplicity, or obviousness; and (iii) suggested improvements that were mutually contradictory and could not be reconciled into a single product suitable for the project's audience.

2.2.3.2. Societal benefit aimed co-creation

Tool 29. Co-creation IP Management Guide for Societal Challenges Projects

Reason for creation: This tool was created to help arrange societal challenge co-creation projects and manage their intellectual property results. Differences in backgrounds, motivations, and legislative knowledge of participants in such projects result in a struggle to agree on contributions, ownership, access, and fair benefit-sharing, while the absence of such agreements results in loss of trust, cancellation of the project in the middle of the way or problems in implementation and licensing the project results. Teams may face confusion

about background vs. foreground assets, translation and derivative rights, confidentiality, and GDPR (General Data Protection Regulation) -aligned data roles, while also trying to balance open access with financial and operational sustainability and meet funder and legal requirements. The aim was to give a clear, practical path for non-specialists to capture contributions, set simple rules for ownership and recognition, and choose fit-for-purpose licences for the project outcomes to make it possible to publish, share, and scale impact with less friction and more confidence

Description: This guide is designed to help mixed teams including public bodies, NGOs, community groups, volunteers, researchers, social enterprises, and SMEs, navigate the complexities of ownership, access, and disclosure in co-created projects. It provides a practical and accessible framework to understand, manage, and leverage IPRs and other intangible assets in project outputs, enabling teams to engage confidently in publishing, sharing, and licensing agreements.

Testing Methodology: A draft version of this tool was shared with Technology Transfer and Innovations Management professionals, as well as with societal entrepreneurs, societal projects initiators and university research management specialists. As a result, four structured feedback forms as well as a set of written and oral comment was got. Among the testers three members of the project SIG Special Interest Group provided their insights and feedback. The testers also suggested to recommend inclusion of the document in the set of mandatory documents provided by funding organisations and research offices of the universities for socially beneficial, medical, and health-supporting projects

Target Audience: This document is intended for project leads and coordinators in societal challenge initiatives, community and charity partners, municipal and public sector stakeholders, researchers and T/KTOs, and SMEs involved in creating, disseminating, or managing co-creation outputs.

User Access: Unrestricted.

Tool 30. Guidance for Managing Intellectual Assets in Patient and Public Involvement (PPI) Contexts

Reason for creation: The tool is designed to help mixed teams (researchers, clinicians, charities, patient groups, SMEs, and public bodies) navigate management of intellectual assets in patient and public involvement context.

Description: The guide provides a practical and accessible framework to understand, manage, and leverage intellectual assets and intellectual property rights that arise from co-created outputs. By clarifying ownership, recognition and benefit-sharing, access and licensing choices, confidentiality, and data governance, the tool supports ethical, equitable, and sustainable use of PPI results.

Testing Methodology: A draft version of the document was shared with societal entrepreneurs with research background, Technology Transfer teams and PPI specialists. As a result, four structured feedback forms as well as a set of written and oral comment was got. Among the testers three members of the project SIG Special Interest Group provided their insights and feedback. The testers also suggested to recommend inclusion of the document in the set of mandatory documents provided by funding organisations and research offices of the universities for socially beneficial, medical, and health-supporting projects.

Target Audience: This document is intended for project leads and coordinators working with PPI, individual researchers and clinicians, TTOs, research support units, charity/NGO partners, community representatives, and SMEs involved in creating, disseminating, or managing PPI outputs.

User Access: Unrestricted.

Tool 31. Rights Decision Maker for Co-creation Participants

Reason for creation: The tool was developed following consultations and at the request of experts in engaged and impact research, facing IP-related issues when arranging projects and planning the dissemination and implementation of the project results. The tool aims to help participants in co-creation in the Public and Patient Involvement or Social Challenges contexts determine whether they are ready to sign their rights or prefer to share the rights.

Description: The tool is designed in the form of a decision tree that helps participants in social benefit co-creation gain a basic understanding of the rights and responsibilities of intellectual property co-owners and, as a result, make informed decisions about their input to the project and the intellectual property rights for project results. The tool helps structure intellectual property rights for university- and association-led projects that utilize the resources and knowledge of individuals, associations, charities, and other key stakeholders in social benefit projects who are not among the project leaders and organizers, as well as increase trust and ensure expectation management in such projects. The tool can be used by technology transfer professional in their interactions with researchers and project teams to simplify further work with the project results.

Testing Methodology: Testing was conducted through consultations and discussions with the project SIG members and a wider audience involved in organizing and participating in societal benefit projects. The tool was updated based on written feedback and discussions.

User Access: Unrestricted.

Tool 32. Considerations and Guidelines on Usage of Creative Commons Licensing and Open-Source Licensing for Co-Creation Projects

Reason for creation: This tool was created to give mixed co-creation teams working on societal benefit projects an approach to find a better way to protect the results of their work, giving the possibility to disseminate, implement, and develop their results inside or outside the team, ensuring that inappropriate usage is avoided.

Description: This is a short guide suggesting Creative Commons and Open-Source licensing as a methodology to protect the results of the societal benefit co-creation projects. It explains the benefits and highlights typical issues of the approach, as well as provides a minimal checklist for release. It is meant as a supplementary, supportive resource for day-to-day decisions in societal benefit projects, not a central policy or full licensing manual.

Testing Methodology: Testing was conducted through consultations with researchers, university research office and innovations development specialists, as well as open-source licensing professionals. The tool was updated based on written feedback and discussions, and its role was reconsidered to become a supportive document directing the users to the other more detailed guides inside the toolbox.

Target Audience: Project leads and coordinators, researchers and software contributors, NGO/public-sector partners, and SMEs involved in societal-benefit co-creation projects.

User Access: Unrestricted.

2.2.4 Transversal Digital Tools

This section presents the software-based tools developed within the project. These tools are designed to operate across the three main scenarios and were created to address common characteristics and needs.

Tool 33. IMPAC3T IntelligLicensAI

Reason for creation: The tool was created to help organisations identify, value, and license their intangible assets in a transparent way, aligned with ESG and FRAND principles, addressing a clear gap in the management of non-classical IP assets.

Its purpose is to generate evidence-based licensing recommendations that link sustainability impact with commercial and societal value, enabling more responsible, traceable, and impact-oriented decision-making.

Description: IMPAC3T IntelligLicensAI is an expert-assisted artificial intelligence tool. The tool enables organisations to find, value, and license their intangible assets (IA) in alignment with ESG principles and FRAND/IAS 38 compliance. Combining Areopa's 4-Leaf Model and 10-Step Methodology with the Valuufy ESG Compass, the tool analyses organisational data to generate evidence-based recommendations for licensing pathways. It supports both traditional IP licensing and non-traditional co-creation or social licensing models, ensuring sustainable impact is linked to commercial and societal value.

Testing Methodology: The development and validation of the tool followed an agile co-creation process tailored to the IMPAC3T IP project's brief time limits. Testing was conducted with 30 participants across SMEs, universities, innovation intermediaries, and investors, who reviewed successive prototype versions via guided demonstrations and structured feedback sessions.

Feedback concentrated on the clarity of asset identification, interpretability of AI-generated recommendations, and usability and transparency of ESG scoring mechanisms. Key improvements implemented include simplified data entry, enhanced dashboard readability, and refined narrative explanations for non-technical users.

The validation and iterative improvement process are documented in a separate Validation Summary and Methodological Note. Two supporting materials: User Guide and Training Toolkit ensure full traceability of user actions, transparent data flow, and structured training materials before dissemination.

Redefined User Group: The IMPAC3T IntelligLicensAI tool is designed for knowledge-intensive innovation ecosystems, serving distinct user roles across the intangible asset lifecycle who work with enterprises:

1. Knowledge Managers (KMIs): Embedded within SMEs or research organisations, KMIs use the tool to capture tacit knowledge and translate it into structured intangible asset artefacts through voice-to-text, document parsing, and guided prompts.
2. Value Managers (VMs): Acting as facilitators across multiple KMIs or departments, VMs validate, classify, and prioritize assets using Areopa's 4-Leaf Model and interpret ESG weightings for licensing or valorization.

3. Innovation Intermediaries (IMs) and IP Professionals: These users assess asset maturity, readiness, and monetization potential. The analytics aid in comparing ESG-linked valuation indicators with traditional IP metrics.

4. Investors and Funding Agencies: For this group, the tool offers evidence-based insights into the ESG and intangible asset performance of potential investees, translating IA

classifications into risk-adjusted financial indicators aligned with IAS 38 and FRAND principles.

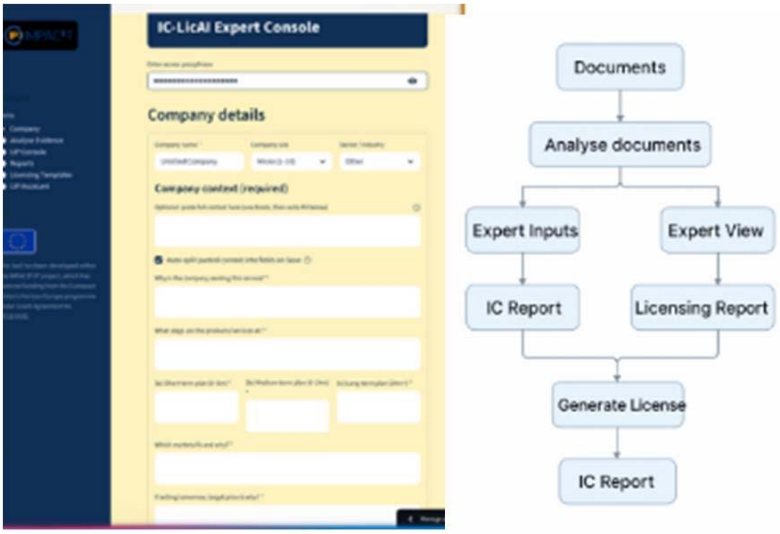

Figure 4: IntelligLicensAI dashboard and output

Dynamic Dashboard and Reporting Suite: Offers real-time visibility of IA portfolios, asset maturity, ESG alignment, and valuation potential.

Traceability and Training Integration: Ensures audit logging of user actions and includes built-in training materials to support hybrid learning.

Key Features of the Tool:

1. Integrated IC–ESG FRAND Architecture ensuring assets are scored against social, environmental, and governance indicators.

2. AI-Driven Asset Identification Engine: Uses NLP and rule-based reasoning to extract intangible artifacts from documents and classify them as tacit or explicit value contributors.

3. FRAND-Aligned Licensing Generator: Suggests traditional, collaborative, or social impact licensing models under Fair, Reasonable, and Non-Discriminatory (FRAND) principles.

4. ESG Valuation and Weighting Module: Links ESG artifacts to intangible capital categories, producing quantified impact metrics and licensable ESG profiles.

5. Dynamic Dashboard and Reporting Suite: Offers real-time visibility of IA portfolios, asset maturity, ESG alignment, and valuation potential.

6. Traceability and Training Integration: Ensures audit logging of user actions and includes built-in training materials to support hybrid learning.

Target Audience: The main target user groups are T/KTOs, Public Research Organisations and Enterprises. Since there is a wide variety of available software tools that support different IP licensing activities this tool can also be useful for individual innovators, researchers and private licensing professionals.

User Access: IMPAC3T IntelligLicensAI and its materials are distributed under an IMPAC3T-IP Co-Creation License (FRAND & ESG-Aligned). This allows for non-commercial use, adaptation, and sharing research, education, and policy development. Commercial application requires prior agreement with ARICC under FRAND terms. Attribution to the IMPAC3T-IP Project (Grant Agreement No. 101135832) and adherence to ESG-aligned principles are mandatory.

Tool 34. Lucidhub

Reason for creation: Lucidhub was created to make research-based innovations easier to find, understand, and license.

While many institutions use their own technology portals, discovery across organizations remains fragmented, which is a challenge for organisations looking to license innovative technologies. Lucidhub addresses this gap by:

- Providing a centralized and AI-enhanced discovery layer to allow licensees find what they are looking for in their own terms, without the limits imposed by the categorisation of the licensor.
- Reducing search friction for potential users who would otherwise need to browse multiple institutional websites.
- Increasing visibility and licensing potential for under-utilized assets, especially in the social sciences and non-patent innovation domains.
- Encouraging adoption of express licensing by demonstrating real-world use and value.

Description: Lucidhub is an online marketplace that aggregates research outputs and intellectual property assets from universities, research organizations, and companies. It is free of charge for research institutions and for potential licensees.

It enables users to discover, evaluate, and access innovations, from software, datasets, and medical tools to educational resources and social-science interventions, through a unified and AI-enhanced search interface.

Lucidhub connects technology creators with potential users and licensees, thereby bridging the gap between research and real-world application.

The platform complements IMPAC3T IP project partner e-lucid, who hosts institutional storefronts, by providing a single searchable entry point for all participating organizations' technologies.

Testing Methodology: User testing was conducted with unguided user tests using HotJar, a digital analytics platform designed to measure and improve user interaction and engagement.

Target Audience: The target audience for the testing encompassed a broad range of innovation-focused users. It included technology transfer professionals aiming to increase the visibility and impact of their institution's innovations, as well as corporate R&D teams and innovation scouts searching for new technologies suitable for collaboration or licensing. Researchers and creators interested in sharing or commercialising their own outputs were also a key group, alongside non-profit and public sector organisations looking for practical tools to support social or health-related interventions. Additionally, the audience included students and early-career innovators exploring pathways to bring research-based solutions to market.

User Access: Lucidhub will provide free access for searching technologies and free listing of up to five products per user, offered throughout the IMPAC3T IP project duration and intended to remain freely accessible and maintained beyond its exploitation phase.

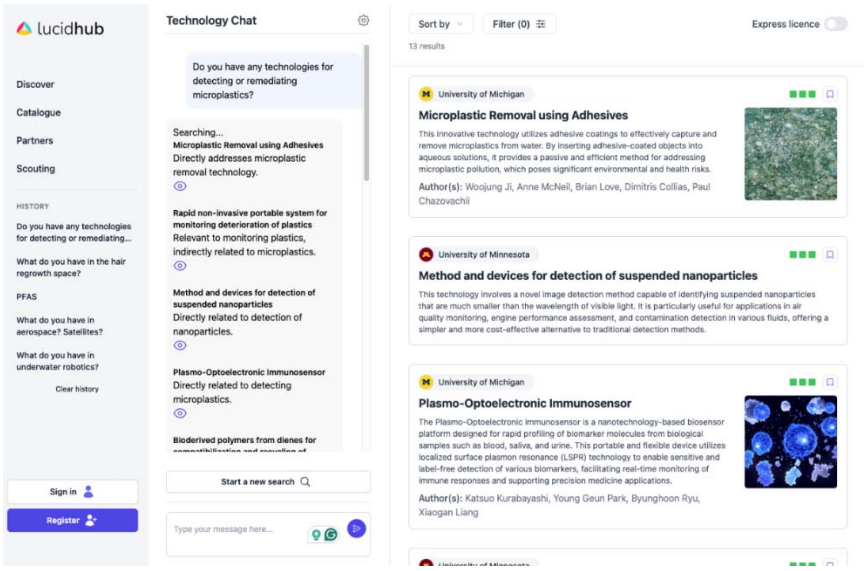

Figure 5: Tool 34. Lucidhub

Tool 35. Software Tool Recommender AI

Reason for Creation: The Software Tool Recommender AI addresses a need in the IP licensing community, where many stakeholders don't use software tools and platforms or struggle to find the right ones. The tool provides a simple way to explore new tools and platforms, and get personalized recommendations based on specific needs. By doing so, it helps stakeholders to find the right solutions and supports the modernizing of IP licensing practices.

Description: Finding software tools to support IP licensing activities is often complex and time-consuming. This interactive and AI-powered tool is designed to help identifying suitable tools based on the user's specific needs and situation, offering personalised recommendations and facilitating easy navigation through the available options. Due to its generic nature and as the recommended software solutions are often relevant across different contexts, the tool can support use cases across all three licensing scenarios - Classical Plus, Crisis, and Co-Creation.

Testing Methodology: The testing and validation of the tool were conducted through a structured approach. Potential testers were identified and recruited from target groups relevant to this tool, ensuring that a diverse range of perspectives and expertise were represented in the testing process. This included private licensing professionals, TTOs and the enterprise-perspective. As part of these target groups, one SIG member was involved in the testing of the tool, who contributed expert insights and feedback. Testers were provided with web-based access to the testing environment, including links and passwords. An online evaluation form was used to collect structured feedback from participants. In total, 6 feedback responses were received from contacts in various countries, including the UK, Germany, Spain, Latvia and Luxembourg. The feedback collected through the online evaluation form was systematically analysed, assessed for relevance and feasibility, and incorporated into the finalization of the tool.

Target Audience: The main target user groups are members of T/KTOs and PROs, private licensing professionals and licensing professionals in enterprises. Since there is a wide variety of available software tools that support different IP licensing activities, this tool may also be useful to individual innovators, researchers and private licensing professionals. The tool is intended for anyone engaged in IP licensing activities that is looking to optimize or

support their workflow with the help of software tools. No prior technical or licensing-specific knowledge is required; the tool is designed to be user-friendly and accessible to both beginners and experts.

User Access: free during the project lifetime. The tool will remain accessible and maintained throughout this period.

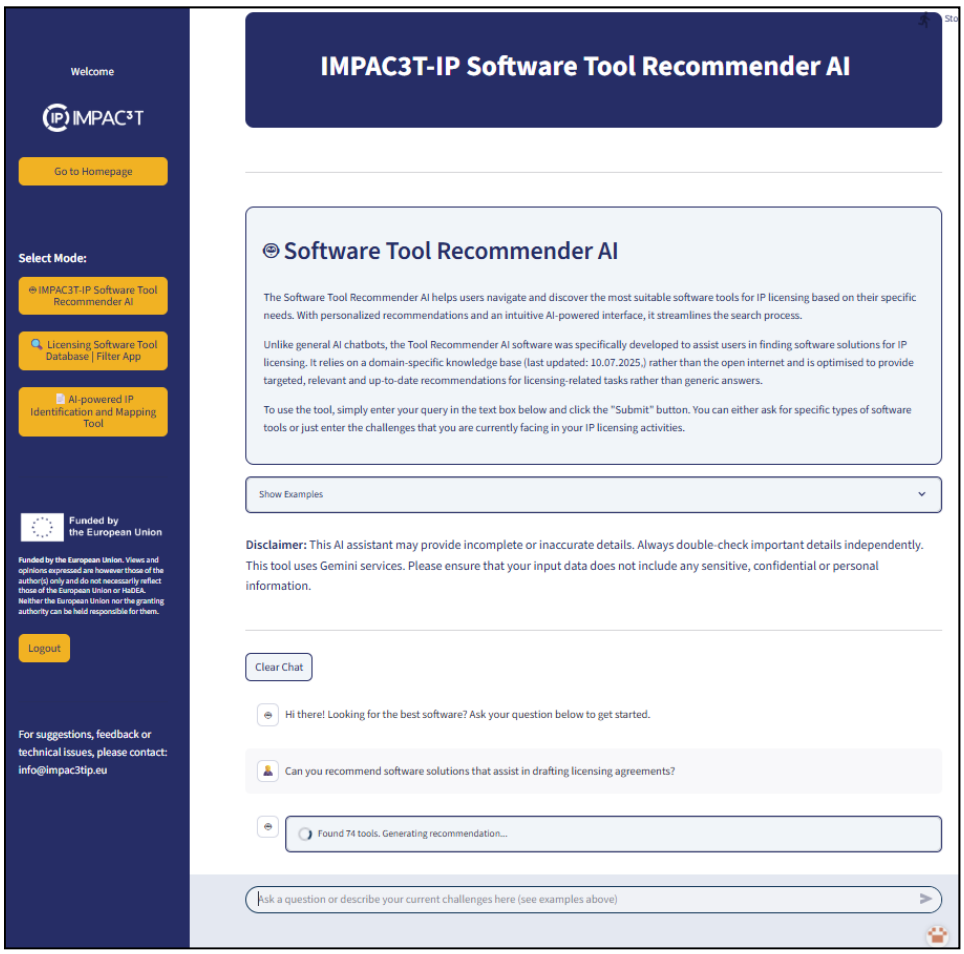

Figure 6: User interface of the Software Tool Recommender AI

Tool 36. Licensing Software Tool Database

Reason for creation: The Licensing Software Tool Database was developed to address the growing difficulty that stakeholders face in navigating the overwhelming number of software solutions available for IP licensing. Because organisations and individuals have diverse needs, including specific workflows, technical requirements, and language preferences, selecting the right tool can be challenging. This database was created to simplify that process by offering a structured, comprehensive, and user-friendly resource that helps users identify the most appropriate software platforms to support their licensing activities.

Description: The targeted search for software tools to support IP licensing activities is often complex and time-consuming. The Licensing Software Tool Database is a comprehensive and regularly updated database that serves as a centralized resource on software tools and platforms used in IP licensing. It organizes these tools into categories and provides filter functionalities, along with detailed descriptions of each tool. As the listed software tools and platforms are relevant across diverse contexts, the database can support use cases across all three licensing scenarios, Classical Plus, Crisis and Co-Creation.

Testing Methodology: The testing and validation of the tool were conducted through a structured approach. Potential testers were identified and recruited from target groups relevant to this tool, ensuring that a diverse range of perspectives and expertise were represented in the testing process. This included private licensing professionals, T/KTOs and the enterprise-perspective. Two SIG members who represented target groups were also involved in the testing of the tool and contributed their expert insights and feedback. Testers were provided with web-based access to the testing environment, including links and passwords. An online evaluation form was used to collect structured feedback from participants. In total, 7 feedback responses were received from contacts in various countries, including the UK, Germany, Austria, the Netherlands and Hungary. The feedback collected through the online evaluation form was systematically analysed, assessed for relevance and feasibility, and incorporated into the finalization of the tool.

Target Audience: This database is mainly designed for T/KTO personnel, private licensing professionals and licensing professionals in enterprises who are seeking software solutions for specific IP licensing activities. Users can efficiently navigate the diverse landscape of available tools and identify those that best match their specific requirements. The tool assumes that the users have some prior experience with IP licensing related activities and are aware of the fields in which they need support from a software solution. The tool is ideal for those who want to explore the full range of available options or are looking for alternatives to the solutions they are currently using.

User Access: free during the project lifetime. The tool will remain accessible and maintained throughout this period.

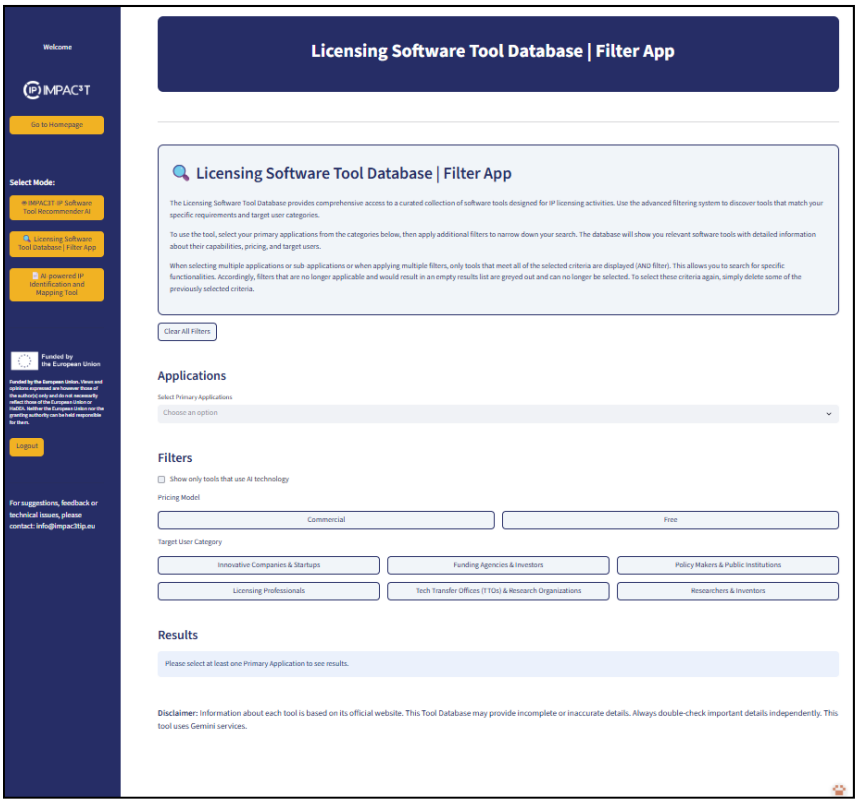

Figure 7: User interface of the Licensing Software Tool Database

Tool 37. AI-powered IP Identification and Mapping Tool

Reason for creation: The AI-powered IP Identification and Mapping originated from the idea of supporting co-creation projects, in which identifying and mapping different aspects of project results presented a significant challenge – particularly helping co-creation participants identifying aspects of intellectual property, such as patentable inventions. Additionally, tests conducted with members of T/KTOs confirmed the original assumption that the tool also offers advantages for them, for example in identifying non-patentable assets in projects in the SSHA.

Description: The main purpose of this interactive and AI-powered tool is to provide a structured and automated method for identifying and mapping IP assets within project results. Through automated analysis of free-text inputs or uploaded documents in various formats, the tool generates an assessment report highlighting potential IP components - such as copyrights, databases, know-how, software or patentable inventions. This makes it relevant not only for co-creation projects but also for initiatives within the Classical Plus scenario, for example for projects in the SSHA, where IP assets are often embedded in non-technical outputs. By identifying and mapping different types of IP, the tool helps to uncover assets that might otherwise remain unnoticed, supporting greater awareness and enabling the development of licensing or IP protection strategies.

Testing Methodology: The testing and validation of the tool were conducted through a structured approach. Potential testers were identified and recruited from target groups relevant to this tool, ensuring that a diverse range of perspectives and expertise were represented in the testing process. This included TTOs and the perspectives of co-creation experts and co-creation participants. As part of the group of testers, one SIG member was involved in the testing of the tool, who contributed her expert insights and feedback. Testers were provided with web-based access to the testing environment, including links and passwords. An online evaluation form was used to collect structured feedback from participants. Additionally, some of the feedback were received by email in unstructured form. In total, 6 feedback responses were received from contacts in various countries, including UK, Netherlands, Ireland and Finland. The feedback collected was systematically analysed, assessed for relevance and feasibility, and incorporated into the finalization of the tool.

Target Audience: The main target user group comprises co-creation teams, including co-creation experts and participants as well as members of Technology Transfer Offices. Also, innovation managers or researchers in PROs or even individual innovators can use the tool. Overall, the IP Identification and Mapping tool is designed for anyone seeking clarity and structure around the IP created during a project. The tool is designed for users with no specific prior knowledge but can also be used by professionals who want to save time when analysing large documents. While the tool provides an initial assessment, it does not replace external professional expertise or legal advice, which is recommended for organisations without previous experience of IP licensing.

User Access: free during the project lifetime. The tool will remain accessible and maintained throughout this period.

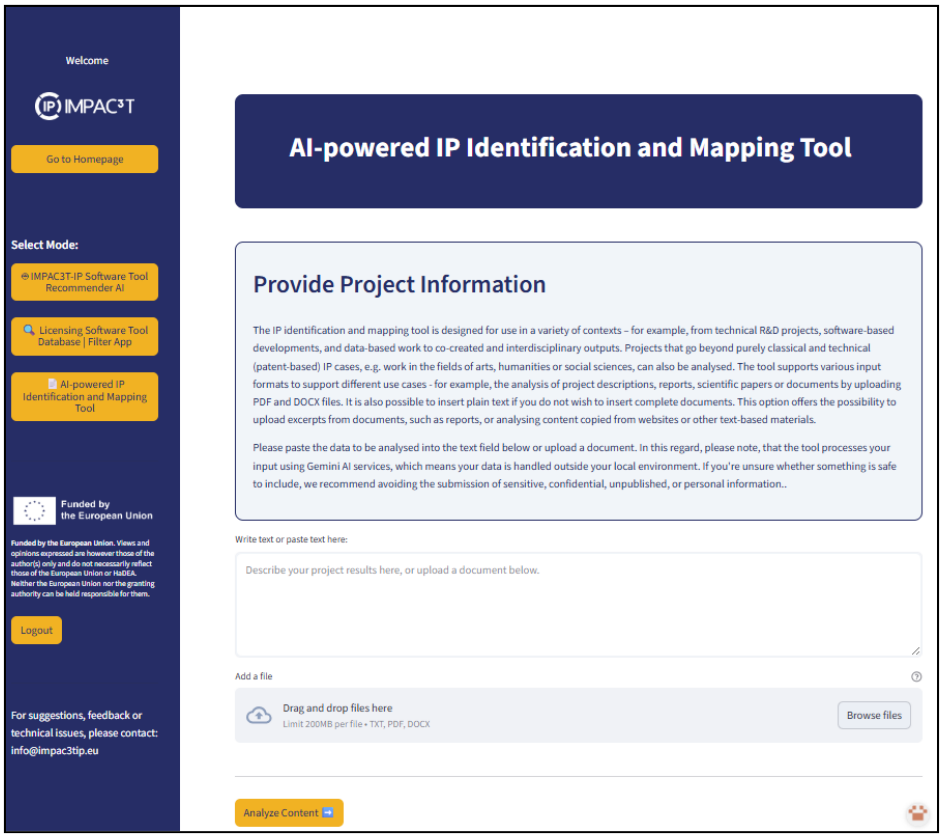

Figure 8: User Interface of the AI-powered IP Identification and Mapping Tool

3. User feedback on the Tools

Throughout the testing phase, users expressed significant interest in both the project's overarching objectives and the practical value of the tools developed. The feedback collected was predominantly positive, with many participants emphasising the clarity, usefulness, and relevance of the toolbox across diverse scenarios. Although the tools were originally conceived to address specific gaps identified within particular sectors and concrete use cases, users consistently highlighted their versatility, noting that the same resources could be effectively applied in a much broader range of contexts.

Beyond validating the initial approach, the feedback also offered constructive insights that guided refinements to improve the final outputs. Participants valued the comprehensive and well-structured nature of the tools, frequently noting that the recurring sections, such as structure, application, and advantages, facilitated navigation and contributed to a clear overall organisation. Several users also remarked that the examples provided were sufficiently illustrative and that adding further detail might compromise usability rather than enhance it. The proposed licensing and funding models were considered suitably general, allowing them to be applied across different domains without requiring substantial adaptation.

In addition, the feedback showed that the tools hold strong potential for sustained use beyond the project's formal duration. Their usability and accessibility were recognised not only by prospective end users, such as early-career researchers from multiple fields, but also by software specialists and intellectual-property experts, who noted that the resources could support their own professional activities. Collectively, these insights affirmed the tools' broad applicability and reinforced their value for a wide array of stakeholders.

4. Conclusions

The completion of Deliverable D4.2 signifies the successful conclusion of the tool-box development and demonstrates the project's perceived potential with the main target groups. Throughout this work package, the tools were iteratively developed, tested, and refined to ensure they respond effectively to the specific needs of users across the three major scenarios: Classical Plus, Crisis, and Co-Creation. This process resulted in the integration of additional tools that were not originally foreseen, expanding the scope and value of the final toolbox.

A key strength of this development work lies in the user-centred approach adopted during development. Continuous feedback from T/KTOs, researchers, cultural institutions, policymakers, enterprises and innovation practitioners allowed the project team to validate assumptions, improve usability, and enhance the functional relevance of each tool. As a result, the toolbox now comprises a robust combination of practical guidelines, digital resources, and AI-enabled solutions capable of supporting diverse actors in navigating complex IP licensing environments.

The application of the toolbox across the major project scenarios has proven its adaptability and operational relevance. Tools such as rights-clearance guidelines, crisis-oriented licensing frameworks, co-creation IP management workflows, and transversal digital platforms (including AI identification, software recommender systems, and aggregators) demonstrate strong alignment with real-world needs. Their successful use in scenario testing confirms the maturity and readiness of the toolbox for broader dissemination.

In conclusion, Deliverable D4.2 consolidates the results of Work Package 4 by delivering a coherent, validated, and user-oriented set of tools that strengthen IP management and licensing capacity across Europe. The work carried out not only fulfils the project's objectives but also lays solid foundations for long-term impact, ensuring that the IMPAC3T-IP Toolbox can serve as a practical, scalable, and inclusive resource for diverse innovation ecosystems.

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