

Intellectual Property (IP) strategy checklist 2026-2028

This checklist is designed to guide applicants in preparing IP strategies for their proposals. It is based on Horizon Europe rules, Horizon Europe Model Grant Agreement (MGA), EIT Legal and Financial Framework, EU Recommendation 2023/499, Code of Practice on the Management of Intellectual Assets for Knowledge Valorisation (2023); EUIPO guidance; WIPO IP Management Framework, and EIT KPIs, and applicable EU and national rules.

1. Ownership and protection of your ideas/innovative products/solutions

- Have you identified the key innovations or technologies requiring protection (general product/service/technology description, processes, components, improvements, etc.)?
- Have you established ownership or co-ownership agreements for key innovations that are relevant to this project?
- Have you considered IP protection for your innovation (i.e. patents, trademarks, design rights)?
- Have you considered trade secrets or confidentiality agreements (NDAs) for non-registrable innovations?

2. IP due diligence & background IP

- Are any of the part of your solutions/products (software, data, algorithms, designs) protected under third-party IP?
- Do you have licenses or permission to use third-party IP included in the solution?
- Have you outlined how IP will be used after the project (e.g., licensing, spin-offs, commercialisation)?
- Have you identified target markets and jurisdictions where IP protection may be required?

3. Commercial readiness & market strategy

- Is the IP strategy aligned with your go-to-market and business strategy?
- Does your plan show how IP will create competitive advantage?

4. Legal, ethical, and regulatory considerations

- Have you considered compliance with relevant regulations (e.g., GDPR, EU AI Regulation for data-driven solutions)?

The applicant acknowledges that the Results developed in the course of this project are the property of the beneficiary(ies) generating them. Access to, use of, or dissemination of such results by third parties shall be subject to applicable intellectual property rights, confidentiality obligations, and relevant provisions under the Financial Support Agreement, Grant Agreement and EIT UM IP Policy [IP-Policy-2021 -EIT-UM-branded_FINAL.pdf](#).

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