

IP TOOLKIT FOR SMES: INTRODUCTION & USER GUIDE

AIMS OF THIS TOOLKIT

This toolkit is aimed at releasing investment opportunities and unlocking commercial and funding potential in intangible and intellectual property (IP) assets in the Western Balkans. The toolkit provides a mixture of educational material, templates and resources that will enable SMEs to understand the importance of IP and implement suitable IP processes and strategies for their specific circumstances.

CONTENTS OF THE TOOLKIT

1 - Introduction to IP

This slide deck provides an introduction to the different types of IP protection, how they can be obtained, and the strengths and weaknesses of each.

2 - Case studies

This slide deck presents 5 case studies showing examples of how IP has been used to achieve commercial success in a number of contexts.

3 - IP Processes

This slide deck covers some of the practical steps SMEs can take to determine and implement their IP strategy.

Further useful resources are also included in the deck:

- Example innovation capture database
- Introduction to protecting confidential information
- Links to example IP assignment documents
- Example IP clause for employment contract
- Cost information for international patent filing
- Cost information for international trademark filing
- Links to patent search tools and other useful resources

This deck is accompanied by the following documents:

3.2 IP Audit Questionnaire

3.3 Example mutual non-disclosure agreement

3.4 Example one way non-disclosure agreement

3.5 Example IP Clause for Employment Contract or Consultancy Agreement

3.6 Invention capture log - Template

3.7 Invention Disclosure – Template



4 - Commercialisation Paths

This slide deck explains what factors determine the value of IP and provides an introduction to how that value can be estimated. An introduction to the various paths through which IP can be commercialised is provided.

USING THIS TOOLKIT

For an SME, items 1 and 2 above provide useful background knowledge to IP. Item 3 provides practical advice and resources. We would recommend working through the IP audit questionnaire step by step to understand your company's current situation and identify any potential weaknesses. Links are provided to other relevant items of the toolkit. Item 4 relates to commercialisation and is therefore most relevant to later stage companies that have some exploitable IP. It is useful however to consider the factors that contribute to IP value from the beginning.

DISCLAIMER

This material does not constitute legal opinion or representation. The information is provided by ClearViewIP as an independent party providing non-legal consultancy services to **The European Investment Bank** and is the opinion of ClearViewIP only.

Legal documents are provided as examples only. Legal advice should be sought to customise these examples to your own needs.

