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D3.2 SECOND REPORT ON IP ADVISORY

| | |
|------------------|--|
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| Abstract | <p>TETRA is an EU-funded project under the Horizon 2020 Research and Innovation programme which aims to offer well-tailored business support services to the third-party beneficiaries of the R&I Actions and the C&S Actions funded under the Next Generation Internet (NGI) - An Open Internet Initiative (H2020-ICT-24-2018-2019) topic.</p> <p>To this end, in relation to the Task 3.1. of the project concerning IP advisory service delivery, the current document aims at identifying and analysing:</p> <ul style="list-style-type: none"> • the main challenges of project beneficiaries regarding IP during the start-up and scale-up phases of their development, • the training evaluation results of the IP webinars and the IP sessions in TETRA Bootcamps, • the meetings/phone calls on IP with project beneficiaries, if there are any, and, • providing suggestions on effective IP management strategies and tools to be used. |
| Keywords | Next Generation Internet, TETRA, Intellectual Property, IP |



DISCLAIMER

The free-of-charge, first-line support provided by the TETRA project aims to help beneficiaries of the “R&I Actions” (co-)funded under the topic H2020-ICT-24-2018-2019 and their third parties to turn their research results into marketable products and services. This support -including support on intellectual property- should not be considered neither as of a legal or professional nature nor substitute to private advisory services.

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| PU | Public, fully open, e.g. web | ✓ |
| CL | Classified, information as referred to in Commission Decision 2005/444/EC | |
| CO | Confidential to TETRA project and Commission Services | |

* Type of deliverable

- R: Document, report
- DEM: Demonstrator, pilot, prototype, plan designs
- DEC: Websites, patents filing, press & media actions, videos, etc.
- OTHER: Software, technical diagram, etc.
- ETHICS: Ethics requirement
- ORDP: Open Research Data Pilot

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EXECUTIVE SUMMARY

Intellectual Property (IP) management is an indispensable element in business activities as it concerns the protection and management of intellectual assets. According to the latest study carried out by Ocean Tomo, the value of intangible assets account for 90% of the total market value of the S&P 500 companies -which was 85% in the previous study in 2015.¹

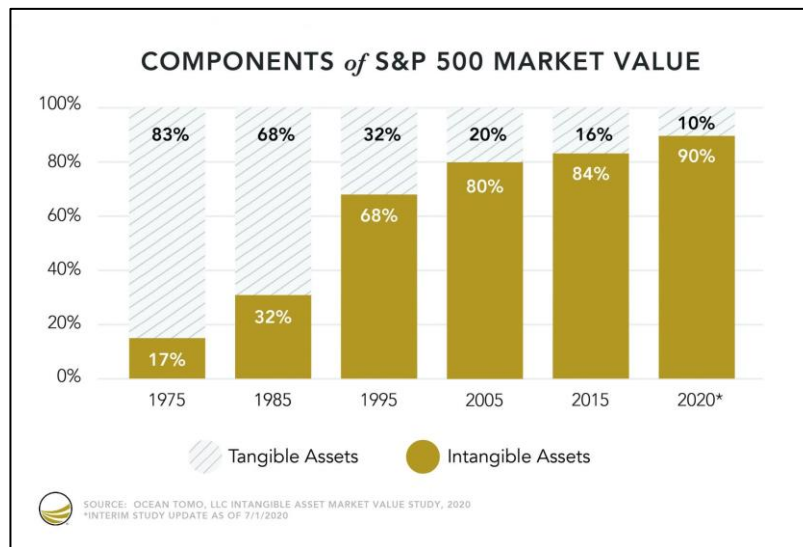


FIGURE 1: SHARE OF INTANGIBLE ASSETS IN S&P 500 MARKET VALUE BY YEAR

Being such a key component in determining the value of a company, intellectual assets take an essential role in the success of businesses. This fact has been clearly underlined by the recent EU Council conclusions on intellectual property policy and the revision of the industrial designs system in the Union, approved by a written procedure on the 10th of November 2020, stating that “IP rights and translating R&I results into the economy will have a major role to play in the reconstruction process and in improving the resilience of EU businesses”.² This is especially true for companies dealing with Internet and IT-related technologies (which is the target audience of the TETRA project), for which IP management has even more significance in business success and sustainability. Nevertheless, because of the non-physical nature of these assets, it is not always very easy for companies to identify and utilise them as a tool to reach their objectives.

With this respect, the third work package “*capacity building to enable the transition from development to market*” of the TETRA project had a task that covers IP advisory services for providing IP services in the form of webinars, online training sessions and assistance during bootcamps and individual coaching through remote means. The task (T3.1) has targeted to develop the content of these services and their delivery.

¹ Ocean Tomo, LLC. *Intangible asset value study*, 2020. Full study can be reached [here](#).

² <https://www.consilium.europa.eu/media/46671/st-12750-2020-init.pdf>

The activities of this WP included:

- IP webinars organised/co-organised and delivered by TETRA,
- remote advisory services,
- the materials developed on IP to better address the needs of the NGI beneficiaries and challenges that they face, and to ensure the project sustainability

During the IP service delivery process, five main challenges* have been identified:

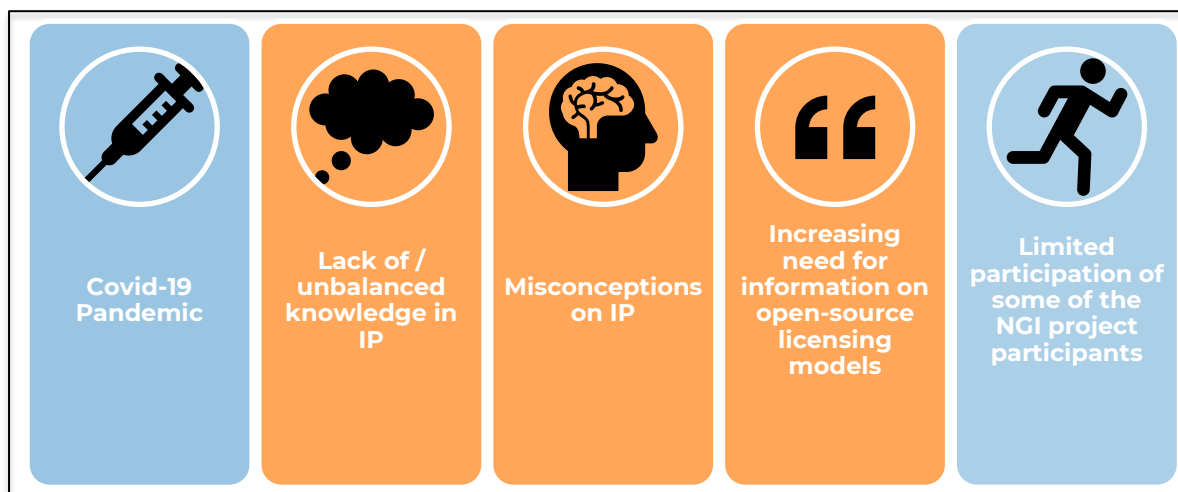


FIGURE 2: IDENTIFIED CHALLENGES

(*) in blue: challenges of TETRA; in orange: general IP challenges of the NGI beneficiaries

Within the TETRA project's T3.1 service delivery, these challenges have been addressed through several activities, seen in the below table.

TABLE 1: TAKEN MEASURES WITHIN THE PROJECT AGAINST THE CHALLENGES

| Challenges addressed | Measures taken |
|--|--|
| Challenge-1: Covid-19 Pandemic | <ul style="list-style-type: none"> ○ Increase in the number of webinar sessions |
| Challenge-2: Lack of/unbalanced knowledge in IP | <ul style="list-style-type: none"> ○ Rearrangement of the webinar curriculum ○ Development of the IP Guides |
| Challenge-3: Misconceptions on IP: Open-source vs. free software | <ul style="list-style-type: none"> ○ Rearrangement of the webinar curriculum ○ Recruitment of external trainers/speakers ○ Development of the IP Guides |
| Challenge-4: Increasing need for information on open-source licensing models | <ul style="list-style-type: none"> ○ Rearrangement of the webinar curriculum ○ Recruitment of external trainers/speakers ○ Development of the IP Guides |
| Challenge-5: Limited participation of some of the NGI project participants | <ul style="list-style-type: none"> ○ Cooperation with other NGIs in the promotion of activities ○ Development of the IP Guides |

In summary, **the 15 IP webinars delivered within the framework of the TETRA project attracted a total of 287 participants from 13 different RIAs (almost 70% of all the audience). Task 3.1 webinar activities were completed with an overall satisfaction rate of 86%.**

Together with other collaborative activities (bootcamps and other collaborative activities), 20 IP activities in Task 3.1 reached 472 participants.

This report provides the insights of these activities carried out within the Task 3.1 *“IP Advisory, training, and linkage to national IP programmes”* by pointing out the results and summary of the delivered services during the project.

The document is divided into five parts, namely; (1) delivered IP webinars, (2) IP sessions at TETRA bootcamps, (3) results of the service delivery and the challenges faced, (4) measures taken to overcome these challenges and (5) provided suggestions and tools for effective management of IP to the bootcamp participants (in their master plans).

1 IP WEBINARS

Within the Task 3.1, three types of training sessions were held:

- Webinars organised by TETRA (“TETRA IP webinars”) and co-organised with the NGI stakeholders (“TETRA co-organised IP webinars”)
- Webinar co-organised with NGI stakeholders
- IP sessions during the bootcamps

The contents of these training sessions are developed by the IPIL team and/or by externally contracted IP professionals (speakers) specialised and experienced in IP and software, where necessary.

1.1 TECHNICAL BACKGROUND

1.1.1 Organisation

i. TETRA IP webinars:

These sessions were organised and managed solely by IPIL (including registration management and engagement activities such as sending reminders, polls and evaluation surveys, etc.), and held online through the GoToWebinar® platform administrated by IPIL.

The webinars were delivered either by IPIL’s internal staff or by the external speakers/trainers contracted by IPIL. The recruitment process of external speakers was carried out according to the EC and internal financial rules: IPIL had submitted a detailed set of specifications for the external speakers contract to a wide range of IP professionals and IP professional associations. The responses were assessed against the speaker's skills to deliver the IP-specific sessions to the TETRA audience, in line with the project budget. A contract was made and signed for each session with each speaker who was awarded the contract.

ii. TETRA co-organised IP webinars:

These sessions were organised in cooperation with the other NGI (Next Generation Internet) community partners, namely; NGI Pointer, NGI Zero, NGI Ontochain, NGI Essif-Lab and NGI Ledger.

Although the participants of the whole NGI community (and public) could join all IP webinars³, these sessions were co-organised with those five RIAs (Research and Innovation Action communities) thanks to our extensive collaboration with them.

As seen in the below table, four webinars were co-organised under this framework and the technical preparations were managed by the partner RIAs. For these sessions, TETRA/IPIL took the role of content preparation (speaker provision, preparation and delivery of the training), and supported the RIAs in promotional activities.

Within the project term, the following **15 IP webinars** took place:

TABLE 2: LIST OF TETRA IP WEBINARS DURING THE PROJECT TERM

| # | Date | Webinar Name | Trainer | Type |
|----|------------|---|---|--|
| 1 | 17.06.2020 | An Introduction to IP | Cyril Dubois (IPIL) Onur Emul (IPIL) | TETRA IP webinar |
| 2 | 15.07.2020 | An Introduction to IP Commercialisation | Onur Emul (IPIL) | TETRA IP webinar |
| 3 | 25.11.2020 | IP Protection in Software Development | Stéphane Ambrosini | TETRA IP webinar |
| 4 | 16.12.2020 | Open-source Software Licences | Sébastien Campion | TETRA IP webinar |
| 5 | 24.02.2021 | IP and Software Code Management | Sébastien Campion | TETRA IP webinar |
| 6 | 21.04.2021 | Managing Copyright with Open Source Licenses and Creative Commons | Diogo Oliveira | TETRA IP webinar |
| 7 | 26.05.2021 | Introduction to Intellectual Property for ICT start-ups | Mathieu Buchkremer | TETRA IP webinar |
| 8 | 02.06.2021 | Intellectual Property in the World of Blockchain | Erwin Sotiri Alberto Ciaramella | Co-organised webinar with NGI Ontochain |
| 9 | 05.10.2021 | Smart use of IP in the Next Generation Internet | Onur Emul (IPIL) | Co-organised webinar with NGI Pointer and NGI Zero |
| 10 | 27.10.2021 | An Introduction to IP for the NGI Community | Onur Emul (IPIL) | Co-organised webinar with NGI Essif-Lab and NGI Ledger (*) |

³ Unless it was a “closed webinar”. The “closed webinars” are aimed only at a limited audience coming from a specific NGI community/communities as the topic of the webinar is NGI-specific.

| | | | | |
|----|------------|--|--------------------------|--|
| 11 | 10.11.2021 | Managing Open-source Software Licences | Erwin Sotiri | Co-organised webinar with NGI Essif-Lab and NGI Ledger (*) |
| 12 | 09.12.2021 | Tools for an Open Business Model: Creative Commons and Open Licences | Diogo Oliveira | TETRA IP webinar |
| 13 | 23.02.2022 | GDPR Fundamentals: Straight to the point! | Isabelle Daguerre (IPIL) | TETRA IP webinar |
| 14 | 09.03.2022 | One step further on GDPR: Privacy and GDPR tools | Isabelle Daguerre (IPIL) | TETRA IP webinar |
| 15 | 23.03.2022 | How to strengthen your software protection through trademark and design rights | Olivier Laidebeur | TETRA IP webinar |

(*) These two webinars were closed webinars i.e. only open to NGI Essif-Lab and NGI Ledger beneficiaries.

1.1.2 Promotion and communication activities

For the TETRA IP webinars, the promotion and communication activities were handled with the support of the partner LOBA, the leader in charge of all communication and promotion activities in the project, as well as with other Consortium partners.

IPIL has provided all the content material and LOBA has prepared the promotional banners and advertisements together with the supervision of website promotion management and carried out the contacts with the other NGI Outreach office and other NGIs.

Each of the TETRA project partner supported IPIL and LOBA in further advertising the IP webinars by using their own tools and networks to widen the dissemination of the information.



Onur Emül
Deputy Manager, International Cooperation at Institut de la Propriété Intellec...
6mo •

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Diogo Morais Oliveira NGIatlantic.eu NGIatlantic.eu Project eSSIF-Lab NGI Explorers NGI Explorers NGI Data Portability and Services Incubator NGI - The Next Generation Internet Fed4FIRE+ ONTOCHAIN NGI POINTER Institut de la Propriété Intellectuelle Luxembourg GIE (IPIL) Trublo.eu NGI Assure LOBA.cx CIVITTA European Startup Network Q-PLAN INTERNATIONAL FVA New Media Research PEDAL Consulting BIC Bratislava (Business & Innovation Centre)
[#opendata](#) [#opensource](#) [#creativecommons](#)





Accueil A propos de l'IPIL Propriété intellectuelle Nos services Coopération internationale Actualités Agenda Contact

November 2020: TETRA Webinar

The TETRA project (*) announces a new webinar on IP protection in software development on 25 November 2020.



Current innovation relies increasingly upon digital technology, and software development lies at the heart of it, whether in pure form as seen with blockchain and AI applications, or paired with physical devices like IoT sensors, medical devices, drones, robots and more.

This webinar presents and explains Intellectual Property (IP) rights with relevance to software innovation, in particular:

- copyright; as it relates to code and other aspects of a software product
- patents; which may be sought for technical effects brought about by new software algorithms and solutions
- registered designs; to protect new and commercially-relevant visual aspects of user interfaces, and
- trade secrets; that can attach to data sets, coding techniques and other proprietary aspects of software development.

Registration and more information [here](#).

(*) IPIL is one of the partners of the TETRA project, funded by the European Commission, aiming at supporting the Next Generation Internet (NGI) society successfully enter the market and accelerate their business. For more information about TETRA please click [here](#).

FIGURE 3: COMMUNICATION ACTIVITIES (EXAMPLES)

Webinars

Webinar #19: Intellectual Property in the World of Blockchain

Webinar powered by NGI TETRA and ONTOCHAIN

When: 02 June 2021 from 10:00 to 11:40 CEST

Where: Online



What will you get?

Managing intellectual property (IP) itself is not an easy task, and when it comes to tackling IP issues in blockchain technologies, it may become even more challenging. NGI TETRA, in cooperation with ONTOCHAIN, is organising a webinar programme to cover the basics of IP in the world of blockchain and to guide you on how to make use of IP when dealing with blockchain-related projects.

First session: Managing IP in Blockchain Applications

When dealing with IP and blockchain, the issues are twofold: securing IP rights in Blockchain technology and managing IP rights through Blockchain technology. On one hand, there is the obvious fact that blockchain software and data deployment must deal with existing IP rights and those generated as a consequence of that deployment, such as software copyright and licensing, databases rights, trade secrets etc. On the other hand, a blockchain seems to be a perfect tool to serve as a legal ledger for the recording of IP rights and several projects are attempting to redesign IP management processes.

Second session: IP Landscape in Blockchain

The presentation will provide an overview of the state of the art in different areas of Blockchain, including Self Sovereign Identity, Copyright Management, Data Provenance, Reputation Models, Value Sharing and Incentives and others and will exemplify it through patent landscapes collected by the tool MyIntelliPatent. This supporting tool is provided by IntelliSemantic to the third parties participating in the NGI ONTOCHAIN project to contribute to their state of the art and to check the eventual need to apply for a new patent if this is suitably motivated by their innovation.

Agenda

How to apply?

FIGURE 4: WEBINAR PROMOTION ON THE TETRA WEBSITE (EXAMPLE)




TETRA Webinar: IP and Software Code Management

Wed, Feb 24, 2021 10:00 AM - 11:00 AM CET
[Show in My Time Zone](#)

During this webinar, we will discover the Software Package Data Exchange (SPDX) license standard, which allows us to standardise the nomenclature of licenses and "compute" their compatibility. Using this standard, we will learn about the different practices used by developers to license their codes. Furthermore, we will see how to use the "version control system", the most important tool used by the developer to audit and understand the creation of source codes.

These elements will guide us to build the software bill of materials, a key element while managing your intellectual property. Finally, we will walk through different tools that can be used in this task.

Fill in below to book your seat for our webinar!

Your TETRA Team

*Required field

| | |
|----------------------|---|
| First Name* | Last Name* |
| <input type="text"/> | <input type="text"/> |
| Email Address* | Country* |
| <input type="text"/> | Choose One...  |

Unless making a secure payment with your credit or debit card via a third-party payment processor, this form is not designed to collect confidential or sensitive personal information (e.g., financial information, social security numbers).

NGI Community*

Choose One... 

☐ By clicking this button, you submit your information to the webinar organiser, who will use it to communicate with you regarding this event and in the framework of the EU-funded project TETRA (Grant Agreement No 825147, more information on <https://business.ngi.eu>), which aims at supporting NGI beneficiaries to commercialise their project outputs. The webinar organiser will use your first name, last name, email address, country, your NGI community, time spent in the session, your evaluation and questions asked to produce a webinar report. The applicable privacy policies for this report can be found under: <https://ipil.lu/fr/mentions-legales/notice-donnees-personnelles> and <https://business.ngi.eu/privacy-policy>.

Register

FIGURE 5: A TYPICAL REGISTRATION PAGE FOR TETRA IP WEBINARS (EXAMPLE)

1.2 TOPICS COVERED

In its initial project proposal, the TETRA project aimed to cover the introductory IP subjects such as IP basics, IP specificities in projects, IP enforcement and IP management in businesses.

However, following the evaluation of the first reporting period, it was noted that the needs of TETRA's target audience were beyond those initially proposed topics, and we have received several requests from our audience about the inclusion of some new and more advanced topics, which were relevant to the projects of the NGI beneficiaries.

In order to meet the real and current needs of the NGI audience, the topics and the coverage of our services have, then, been extended and updated, and the TETRA team enhanced its cooperation with the other RIAs to better address the specific needs. Finally, during the second reporting period, the TETRA IP team introduced a new webinar programme by including a number of external expert speakers and organised cooperative webinars in collaboration with the other RIAs.

As a result, during the whole project term, the following topics were covered in the TETRA IP webinars:

- IP basics (patents, trade mark, design, copyright)
- IP specificities in IT projects (IP in software code management, IP exploitation)
- Fundamentals of IP enforcement
- IP management in businesses (IP strategy)
- Management of open source software licenses
- Creative commons and the use of creative commons licences
- IP specificities in blockchain applications/projects
- Open business models
- Tackling GDPR and privacy issues in projects and GDPR tools

1.3 WEBINAR EVALUATION RESULTS

After the end of each IP webinar⁴, the participants were asked to reply to an online evaluation survey, which was automatically displayed on the screen of the participant.

Within the very same day of each IP webinar, the results were collected and analysed by IPIL and shared in a report with the coordinator. In the following pages, the overall results for those 15 IP webinars are summarised.

The survey questions along with the number of participants and survey respondents for each TETRA IP webinar are shown on the tables below:

TABLE 3: EVALUATION SURVEY QUESTIONS OF THE IP WEBINARS

| Survey Question | Answer Scale | | | | |
|--|---|--------------|-----------------------------------|---|--------------------------|
| The webinar contents were relevant to what has been communicated | <i>Strongly Agree</i> | <i>Agree</i> | <i>Neither Agree nor Disagree</i> | <i>Disagree</i> | <i>Strongly Disagree</i> |
| The webinar contents were comprehensive | <i>Strongly Agree</i> | <i>Agree</i> | <i>Neither Agree nor Disagree</i> | <i>Disagree</i> | <i>Strongly Disagree</i> |
| The webinar contents were easy to understand | <i>Strongly Agree</i> | <i>Agree</i> | <i>Neither Agree nor Disagree</i> | <i>Disagree</i> | <i>Strongly Disagree</i> |
| The duration of the training was... | <i>very short, could have been longer</i> | | <i>Optimal</i> | <i>very long, could have been shorter</i> | |
| Overall, how would you rate the webinar? | <i>Very good</i> | <i>Good</i> | <i>Average</i> | <i>Bad</i> | <i>Very Bad</i> |

⁴ For most of the webinars co-organised with other RIAs, no evaluation surveys were conducted as the organisation of these webinars has been handled by those cooperated RIAs. See Table-3 for more information.

TABLE 4: PARTICIPATION STATISTICS OF IP WEBINARS

| # | Webinar Name | # Registrations | # Participants | # Survey Respondents |
|----|---|-----------------|----------------|----------------------|
| 1 | An Introduction to IP | 35 | 28 | 18 |
| 2 | An Introduction to IP Commercialisation | 26 | 16 | 9 |
| 3 | IP Protection in Software Development | 46 | 24 | 9 |
| 4 | Open-source Software Licences | 38 | 24 | 14 |
| 5 | IP and Software Code Management | 18 | 13 | 9 |
| 6 | Managing Copyright with Open Source Licenses and Creative Commons | 22 | 13 | 10 |
| 7 | Introduction to Intellectual Property for ICT start-ups | 27 | 20 | 10 |
| 8 | Intellectual Property in the World of Blockchain <i>(co-organised webinar with NGI Ontochain)</i> | 50 | 34 | 18 |
| 9 | Smart use of IP in the Next Generation Internet <i>(co-organised with NGI Pointer and NGI Zero)</i> | (*) | 30 | (**) |
| 10 | An Introduction to IP for the NGI Community <i>(co-organised with NGI Essif-Lab and NGI Ledger) – closed webinar</i> | 18 | 18 | (**) |
| 11 | Managing Open-source Software Licences <i>(co-organised with NGI Essif-Lab and NGI Ledger) – closed webinar</i> | 18 | 18 | (**) |
| 12 | Tools for an Open Business Model: Creative Commons and Open Licences | 32 | 19 | 13 |
| 13 | GDPR Fundamentals: Straight to the point! | 24 | 13 | 9 |
| 14 | One step further on GDPR: Privacy and GDPR tools | 17 | 10 | 7 |
| 15 | How to strengthen your software protection through trademark and design rights | 10 | 7 | 6 |
| | TOTAL | 381 | 287 | 132 |

(*) No registration was required for this webinar.

(**) No survey conducted by the organiser of these webinars.

Q1 – The webinar contents were relevant to what has been communicated:

This question was asked in order to evaluate the relevancy of the communication activities and the webinar contents. The overall results are as follows:

TABLE 5: RESULTS OF Q1 ON THE RELEVANCY OF THE IP WEBINAR CONTENTS

| Response | Answer/Total respondents ⁵ | Rate, % |
|----------------------------|---------------------------------------|---------|
| Strongly Agree | 77/132 | 58% |
| Agree | 47/132 | 36% |
| Neither agree nor disagree | 6/132 | 5% |
| Disagree | 2/132 | 2% |
| Strongly Disagree | 0/132 | 0% |

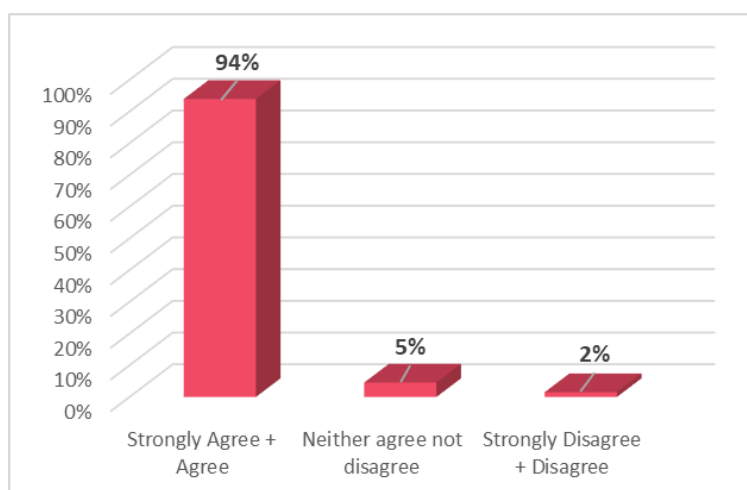


FIGURE 6: RESULTS OF Q1 (MERGED)
“THE WEBINAR CONTENTS WERE RELEVANT TO WHAT HAS BEEN COMMUNICATED”

According to the results, 94% of the webinar participants have found the webinar communication activities relevant to the delivered contents. Only two participants out of 132 (less than 2%) survey respondents disagreed.

It has been noted that those two negative opinions on the relevancy were received for the Blockchain webinar (see Table 3, webinar no.8), which was a cooperative webinar with two different speakers, one from TETRA, and the other from Ontochain. No further information was provided by those two respondents about which of these two sessions their evaluation corresponded to.

⁵ Total numbers are calculated according to the available data (i.e. no data collected for the three cooperative webinars – see table 3), i.e. the success rate represents the average of the 12 webinars.

Q2 – The webinar contents were "comprehensive":

This question was asked in order to evaluate the scope and extensiveness of the webinar contents. The overall results are as follows:

TABLE 6: RESULTS OF Q2 ON THE COMPREHENSIVENESS OF THE IP WEBINARS

| Response | Answer/Total respondents ⁶ | Rate, % |
|----------------------------|---------------------------------------|---------|
| Strongly Agree | 52/132 | 39% |
| Agree | 66/132 | 50% |
| Neither agree nor disagree | 12/132 | 9% |
| Disagree | 2/132 | 2% |
| Strongly Disagree | 0/132 | 0% |

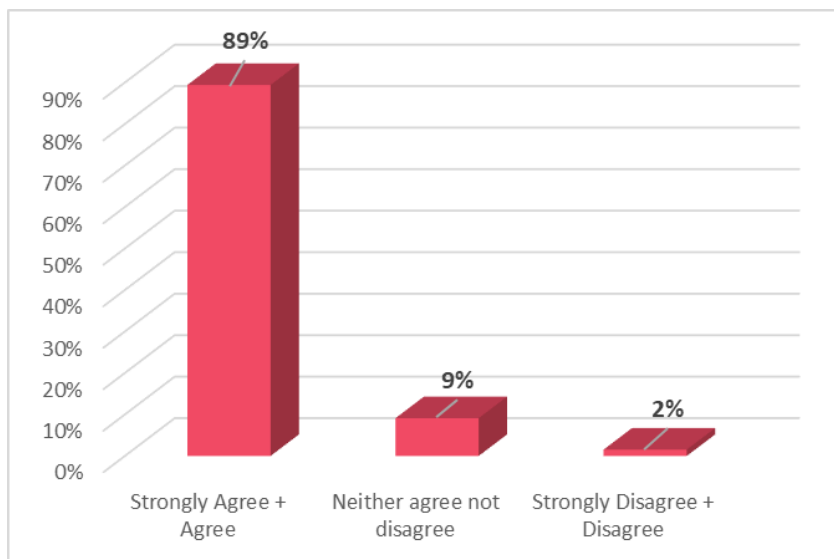


FIGURE 7: RESULTS OF Q2 (MERGED)
"THE WEBINAR CONTENTS WERE COMPREHENSIVE"

The results revealed that almost 9 out of 10 respondents believed the contents of our webinars were comprehensive. Similar to the previous question, the two participants of the Blockchain webinar were not fully satisfied with the scope of contents without leaving any further comments.

⁶ Total numbers are calculated according to the available data (i.e. no data collected for the three cooperative webinars – see table 3), i.e. the success rate represents the average of the 12 webinars.

Q3 – The webinar contents were "easy to understand":

Because of the nature of the covered topics and the different knowledge levels and experiences in the field of the participants, it is sometimes possible that the audience of the IP webinars may find the contents difficult to understand. For this reason, this question was asked to allow us to evaluate the clarity of the contents and the lucidness of the trainers. The overall results are as follows:

TABLE 7: RESULTS OF Q3 ON THE CLARITY OF THE IP WEBINARS

| Response | Answer/Total respondents ⁷ | Rate, % |
|----------------------------|---------------------------------------|---------|
| Strongly Agree | 50/132 | 38% |
| Agree | 69/132 | 52% |
| Neither agree nor disagree | 10/132 | 8% |
| Disagree | 3/132 | 2% |
| Strongly Disagree | 0/132 | 0% |

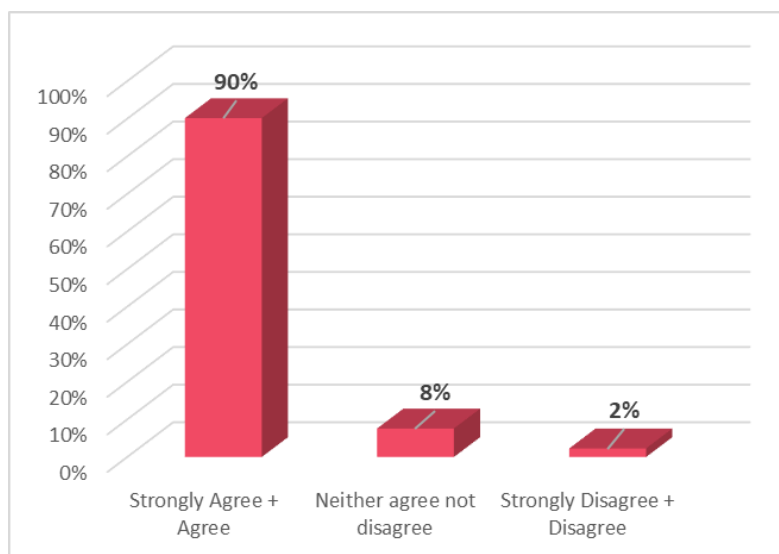


FIGURE 8: RESULTS OF Q3 (MERGED)
"THE WEBINAR CONTENTS WERE EASY TO UNDERSTAND"

According to the results, a high majority of the survey respondents (90%) found the contents easy to understand. Only three out of 132 participants, who joined the last two webinars in the first reporting period, disagreed with the clarity of the contents. It is believed that this is mainly because of the complexity and specificities of the topics covered in those two webinars, which also strongly depends on the personal background of IP knowledge.

⁷ Total numbers are calculated according to the available data (i.e. no data collected for the three cooperative webinars – see table 3), i.e. the success rate represents the average of the 12 webinars.

Q4 – The duration of the training was:

This question was asked in order to understand the optimum duration of the webinars. All IP webinars lasted around one hour (± 15 minutes) depending on the question and answers session held at the end of the sessions. The overall results are as follows:

TABLE 8: RESULTS OF Q4 ON THE DURATION OF THE IP WEBINARS

| Response | Answer/Total respondents ⁸ | Rate, % |
|------------------------------------|---------------------------------------|---------|
| very short, could have been longer | 15/132 | 11% |
| Optimal | 102/132 | 77% |
| very long, could have been shorter | 15/132 | 11% |

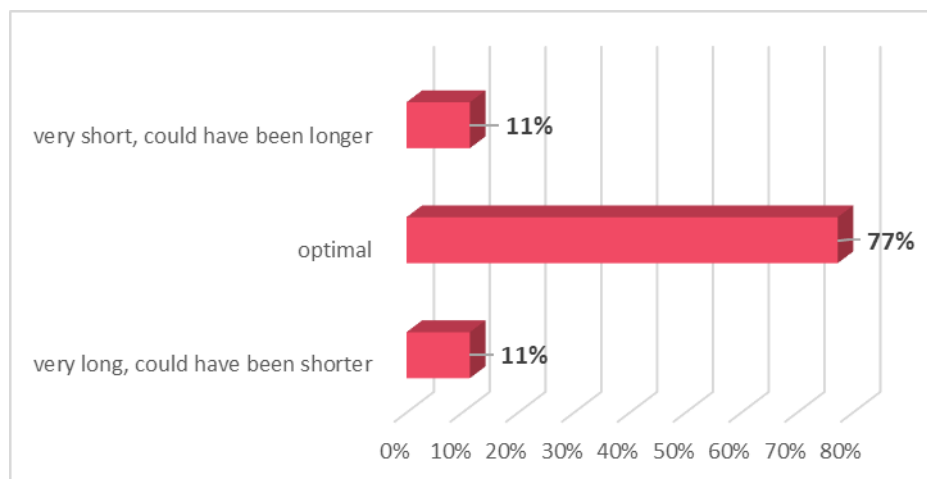


FIGURE 9: RESULTS OF Q4 (MERGED)
"THE DURATION OF THE WEBINAR WAS..."

According to the results, more than 3/4 of all survey respondents believed that the duration of our webinars was optimal.

⁸ Total numbers are calculated according to the available data (i.e. no data collected for the three cooperative webinars – see table 3), i.e. the success rate represents the average of the 12 webinars.

Q5 – Overall, how would you rate the webinar?

This question was asked in order to quantify the overall success rating of the webinar. The overall results are as follows:

TABLE 9: RESULTS OF Q5 ON THE OVERALL RATING OF THE IP WEBINARS

| Response | Answer/Total respondents ⁹ | Rate, % |
|-----------|---------------------------------------|---------|
| Very Good | 64/132 | 49% |
| Good | 48/132 | 36% |
| Average | 17/132 | 13% |
| Bad | 3/132 | 2% |
| Very Bad | 0/132 | 0% |

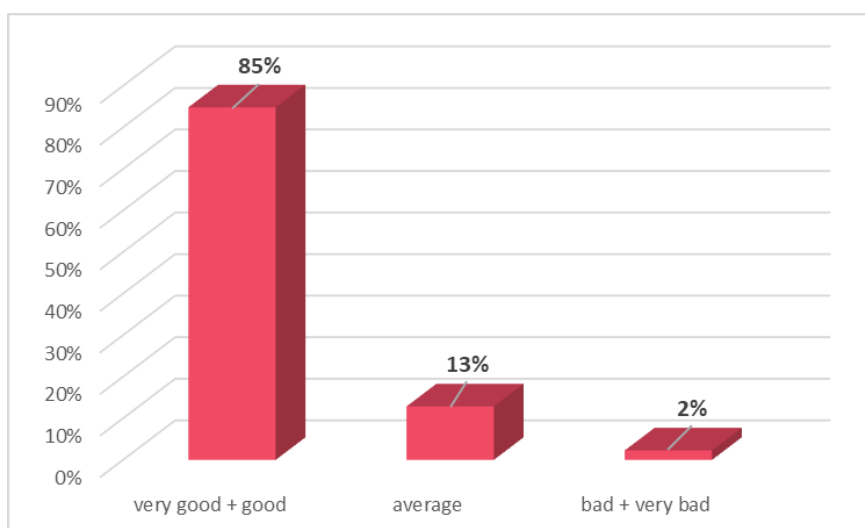


FIGURE 10: RESULTS OF Q5 (MERGED)
“OVERALL, HOW WOULD YOU RATE THE WEBINAR?”

The overall results showed that 85% of the survey respondents rated our IP webinars as “very good” or “good” (with “very good” in the majority; almost the half) and only three participants out of 132 respondents, representing 2%, declared that they were not fully satisfied with our webinars.

Those negative turnouts (one from the previous reporting period) belong to the Blockchain webinar.

⁹ Total numbers are calculated according to the available data (i.e. no data collected for the three cooperative webinars – see table 3), i.e. the success rate represents the average of the 12 webinars.

The majority of the “average” mark (10/17) was received in the first reporting period and the remaining seven “average” evaluations belong to the same “blockchain” webinar.

Overall, the IP webinars delivered within the TETRA project received 86% rating with marks ranging from 71% to 96%. The individual success rates are as follows:

TABLE 10: INDIVIDUAL SUCCESS RATINGS OF THE IP WEBINARS

| # | Webinar Name | # Participants | Success Rate |
|--------------|---|----------------|--------------|
| 1 | An Introduction to IP | 28 | 87% |
| 2 | An Introduction to IP Commercialisation | 16 | 93% |
| 3 | IP Protection in Software Development | 24 | 93% |
| 4 | Open-source Software Licences | 24 | 80% |
| 5 | IP and Software Code Management | 13 | 80% |
| 6 | Managing Copyright with Open Source Licenses and Creative Commons | 13 | 94% |
| 7 | Introduction to Intellectual Property for ICT start-ups | 20 | 90% |
| 8 | Intellectual Property in the World of Blockchain (co-organised webinar with NGI Ontochain) ¹⁰ | 34 | 71% |
| 9 | Smart use of IP in the Next Generation Internet (co-organised with NGI Pointer and NGI Zero) | 30 | (*) |
| 10 | An Introduction to IP for the NGI Community (co-organised with NGI Essif-Lab and NGI Ledger) | 18 | (*) |
| 11 | Managing Open-source Software Licences (co-organised with NGI Essif-Lab and NGI Ledger) | 18 | (*) |
| 12 | Tools for an Open Business Model: Creative Commons and Open Licences | 19 | 91% |
| 13 | GDPR Fundamentals: Straight to the point! | 13 | 96% |
| 14 | One step further on GDPR: Privacy and GDPR tools | 10 | 83% |
| 15 | How to strengthen your software protection through trademark and design rights | 7 | 93% |
| TOTAL | | 287 | 86% |

(*) No survey data is collected by the organiser RIAs in these cooperative webinars.

¹⁰ Being the least popular webinar, the Blockchain webinar received two “very good” rating, nine “good” ratings, five “average” rating, one “bad” and one “very bad” rating. The webinar hosted 34 participants and only 18 of them responded to the evaluation survey.

Individual Comments Received:

Here is the collection of some comments received from webinar participants:

- *Thank you! Have been listening to a number of Tetra webinars, this one I also find informative and relevant. Knowledgeable speaker, easy and pleasant to listen to. Hope to see more experts-practitioners in the upcoming sessions. /NGI TRUST*
- *Could be nice to see an example that uses all the IPRs as a connecting theme in the presentations. /NGI LEDGER*
- *Very clear explanation of this heavy topic. /NGI TRUST*
- *There was a lot of new information for me, some of them not so easily understandable, but generally the webinar was very relevant and the presenter knowledgeable. Thank you! /non-NGI PARTICIPANT*
- *An awesome presentation like before, thank you very much for your cooperation and I hope to join new ones in the near future. /NGI EXPLORERS*
- *Thank you much, the webinar was very relevant, should be organised again with more time dedicated to detailed analysis of some aspects of open source licensing. /non-NGI PARTICIPANT*
- *That was very informative! It came up that I didn't know many aspects of IP before. So satisfied. /NGI EXPLORERS*
- *Thank you for the examples provided. Helped a lot. /ONTOCHAIN*
- *Can you organise a longer session on open source licensing? There is much to investigate there. /non-NGI PARTICIPANT*
- *One hour is a bit long for that much of information. But informative presentation. /NGI ZERO*
- *It was a bit complex issue for us in the IT sector but I see the relevancy. Thank you for the smooth organisation. /NGI LEDGER*
- *I enjoyed the speaker and examples. If the session is to be repeated, I will inform my colleagues. /non-NGI PARTICIPANT*

Participation of NGI projects in IP Webinars:

Although the contents of the webinars have been, to a general extent, specific to NGI project participants, the IP Webinars were open to the public. Therefore, these public webinars were promoted on social media channels, which obviously attracted non-NGI participants. The table below shows the participation rates of the NGI projects in our webinars.

TABLE 11: PARTICIPATION RATES OF THE NGI PROJECTS IN THE IP WEBINARS

| NGI Project | No. of Registrations ¹¹ | Not Joined ¹² | No. of Participants ¹³ | % of all Participants ¹⁴ |
|---------------|------------------------------------|--------------------------|-----------------------------------|-------------------------------------|
| non-NGI | 142 | -61 | 81 | 32% |
| NGI LEDGER | 38 | -6 | 32 | 12% |
| NGI TRUST | 38 | -13 | 25 | 10% |
| NGI TETRA | 28 | -4 | 24 | 9% |
| ESSIF-LAB | 27 | -6 | 21 | 8% |
| NGI EXPLORERS | 32 | -12 | 20 | 8% |
| ONTOCHAIN | 23 | -6 | 17 | 7% |
| DAPSI | 21 | -5 | 16 | 6% |
| NGI ATLANTIC | 7 | -2 | 5 | 2% |
| NGI ZERO | 7 | -3 | 4 | 2% |
| NGI POINTER | 7 | -3 | 4 | 2% |
| NGI4ALL | 4 | -1 | 3 | 1% |
| ASSURE | 4 | -1 | 3 | 1% |
| TRUBLO | 3 | -1 | 2 | 1% |
| TOTAL | 381 | -124 | 257¹⁵ | |

The results show that 68% of our participants were coming from the NGI communities led by NGI LEDGER (12%) and NGI TRUST (10%).

¹¹ Participants who registered to the webinars by filling in the online registration form and who got the webinar link.

¹² Participants who registered to the webinar but did not participate. i.e. number of “no shows”.

¹³ Participants who actually joined the session.

¹⁴ Percentage of the webinar participants over all participants (i.e. 257: excludes the 30 participants of the “Smart use of IP in the Next Generation Internet” webinar).

¹⁵ Number does not include the 30 participants of the “Smart use of IP in the Next Generation Internet” (webinar no.9) webinar as no registration data (i.e. distribution of participants) was collected by the organiser.

2 IP ADVISORY SERVICES

2.1 IP SESSIONS AT TETRA BOOTCAMPS

During the four TETRA bootcamps, the following individual IP sessions covering the different aspects of IP were organised. The questions of the participant teams were also answered during the presentations and in the individual coaching sessions.

TABLE 12: IP SESSIONS AT THE TETRA BOOTCAMPS

| Bootcamp Name | Bootcamp Dates | IP session Name | Speaker(s) in the IP session | # Bootcamp Participants |
|----------------------|--------------------|--|--|-------------------------|
| Build-up Bootcamp #1 | 29.09 – 01.10.2020 | Fundamentals of IP management in NGI projects | Onur Emul (IPIL) | 51 |
| Scale-up Bootcamp #1 | 16.03 – 18.03.2021 | Open-source licencing | Erwin Sotiri Onur Emul (IPIL) | 50 |
| Build-up Bootcamp #2 | 29.06 – 01.07.2021 | Boosting your business: Managing IP strategy | Onur Emul (IPIL) | 25 |
| Scale-up Bootcamp #2 | 23.11 – 25.11.2021 | Managing IP around free software for socially responsible businesses | Gabriel Ku Wei Bin Onur Emul (IPIL) | 27 |

The contents of each IP session have been decided in line with:

- the general motto of the bootcamp,
- the target audience (e.g. for build-up bootcamps: IP fundamentals, for scale-up bootcamps: advanced IP topics) and
- the needs of the audience (collected during the IP webinars through the evaluation forms, feedback through individual contacts with the audience/RIAs, and during the task force meetings).

Consequently, the following topics were covered during these IP sessions at the bootcamps:

TABLE 13: IP TOPICS COVERED AT THE TETRA BOOTCAMPS

| | | | |
|-----------------|--|-----------------|---|
| Build-up | <ul style="list-style-type: none"> • IP basics • IP management and commercialisation • IP strategy making | Scale-up | <ul style="list-style-type: none"> • Open source software (OSS) licensing • Different types of software licences • Example company policies for OSS licences |
|-----------------|--|-----------------|---|

2.2 OTHER ADVISORY SERVICES

Because of the Covid-19 pandemic, the number of in-person/face-to-face events organised within the Tetra project was limited. From the Task 3.1 services perspective, the IP team (IPIL) participated in only one face-to-face event, which was co-organised with NGI Explorers. This event, “NGI Explorers Immersion Bootcamp” took place before the pandemic on 19-21 November 2019 in Warsaw, Poland with 32 participants.

Prior to the event and in cooperation with NGI Explorers, a survey on “the IP needs of the audience” had been carried out, and the contents of the presentations were formed based on the results of this survey to better address the needs of the audience. Henceforth, two workshops were carried out on the second and the third day of the programme about “Introduction to IP” and “IP commercialisation”.

According to the feedback received from the organisers, these IP sessions were among the most successful sessions with a high satisfaction rate (see Figure 10 below).

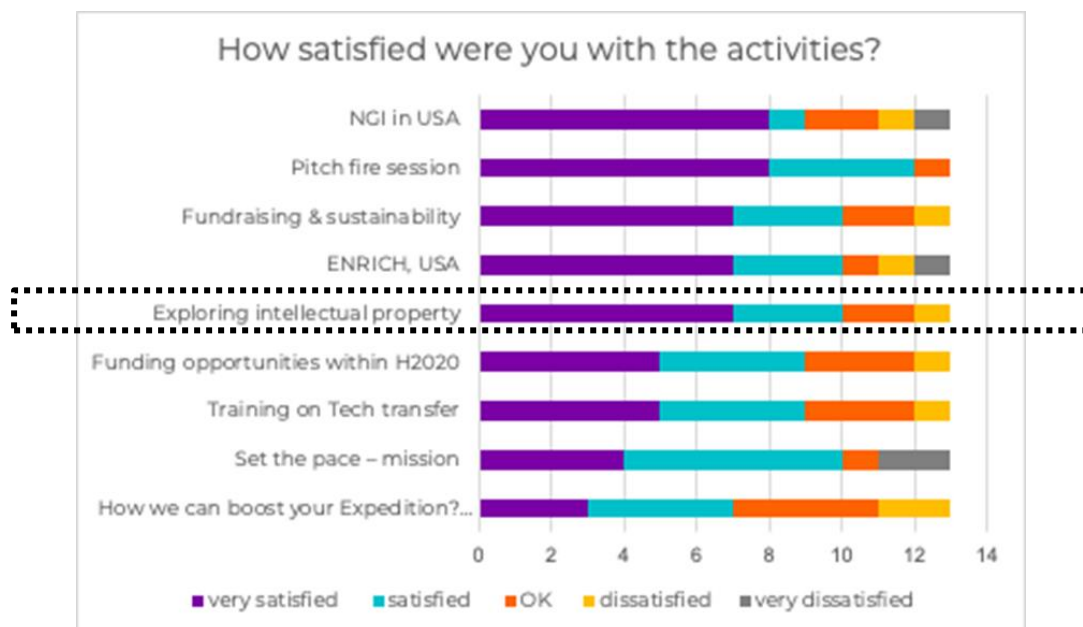


FIGURE 11: FEEDBACK FROM THE NGI EXPLORERS BOOTCAMP

3 RESULTS AND CHALLENGES

3.1 OVERALL RESULTS

In summary, the **15 IP webinars** delivered within the framework of the TETRA project attracted a total of **287 participants from 13 different RIAs** (almost 70% of all the audience). Task 3.1 webinar activities were completed with an **overall satisfaction rate of 86%**.

IP was always a part of the TETRA bootcamp organisation and within the four bootcamps, **four dedicated IP sessions** were organised reaching **a total of 153 bootcamp participants**.

Overall, as summarised in the below table, the **20 IP activities** in Task 3.1 **reached 472 participants**.

TABLE 14: NGI TETRA IP SERVICES OUTREACH

| | # Events | # Participants |
|----------------------------|-----------|----------------|
| TETRA IP Webinars | 11 | 187 |
| Co-organised IP webinars | 4 | 100 |
| TETRA Bootcamps | 4 | 153 |
| Other events ¹⁶ | 1 | 32 |
| TOTAL | 20 | 472 |

3.2 CHALLENGES FACED

Challenge-1: Covid-19 Pandemic

As in all other sectors, the Covid-19 pandemic has had a considerable impact on the NGI project beneficiaries and also on us, as the TETRA Consortium.

With travel restrictions and social distancing measures, all T3.1 activities¹⁷ were carried out in online format, and face-to-face service delivery means have been all cancelled.

¹⁶ NGI Explorers Warsaw Bootcamp (see 2.2)

¹⁷ Apart from the first on-site training activity held prior to the Covid pandemic (i.e. participation in NGI Explorers Warsaw Bootcamp).

However, this phenomenon was recognised as an “opportunity” since these new working conditions obligate our audience to participate more actively in remote activities, which is already key in Task 3.1 services and it is believed that the ease of online participation increased the participant numbers in general.

Challenge-2: Lack of / unbalanced knowledge in IP

This is a general challenge for all IP service providers as IP management requires specific expertise in many fields ranging from science and engineering to law and social affairs. Therefore, it is generally seen as highly complex and/or time-consuming, although it is an integrated part of a business strategy.

Therefore, fulfilling these knowledge gaps in IP is one of the core issues, especially for businesses dealing in information and internet technologies and in novel advanced technologies such as blockchain or Internet of Things (IoT).

Besides, as a specific challenge for TETRA, NGI project beneficiaries constitute a large group with varied backgrounds in IP rights. Moreover, even in the same RIA, the project maturity levels were not the same (e.g. early-stage vs. late-stage developers) which created a particular issue for finding a balance in IP service delivery.

Challenge-3: Misconceptions on IP: Open-source vs. free software

Open-source software generally describes software with publicly available source codes, which third parties can access, modify and re-distribute. However free availability of software (public-domain) does not necessarily mean that it is IP-free without any restrictions. The misunderstanding of “if there is freely downloadable software on the Internet, it means it is IP-free” is a big mistake that many developers or users are not aware of.

Challenge-4: Increasing need for information on open-source licensing models

In line with the above challenge, in our webinars, we identified that the need for accessing “clear” information on open-source licensing is increasing. Confirmed by the latest European Commission policies and increased use of open-source codes, this is especially essential for businesses working in the IT environment and within the project beneficiaries of NGI.

Challenge-5: Limited participation of some of the NGI project participants

As seen from Table 10 in the previous section, the participation of some of the NGI project beneficiaries in IP webinars was limited. However, when the first and the second reporting period results are compared, the increase in the diversity of NGI participants in the IP webinars is quite visible.

The limited participation of some of the NGI projects is generally explained by the weak relevancy of the scopes of these RIAs. For example, Think NEXUS (whose beneficiaries never attended our activities) aims to reinforce EU-US collaboration through its dedicated think tank. Therefore, as a CSA (Coordination and Support Action community) initiative, the IP advisory services of TETRA (including IP webinars) are not directly relevant to the aim of this RIA.

On the other hand, the lack of interest of some RIAs in TETRA IP services (along with other TETRA services) has always been an issue during the project implementation.

TABLE 15: NGI PROJECTS IN THE IP WEBINARS - COMPARISON

| | NGI/RIAs | | NGI/RIAs |
|-------------------------------|--|--------------------------------|---|
| First reporting Period | 1. NGI EXPLORERS 2. NGI TRUST 3. NGI LEDGER 4. NGI DAPSI 5. NGI ESSIF-LAB 6. NGI ZERO 7. NGI POINTER 8. NGI ATLANTIC 9. NGI4ALL 10. NGI TETRA | Second Reporting Period | 1. NGI EXPLORERS 2. NGI TRUST 3. NGI LEDGER 4. NGI DAPSI 5. NGI ESSIF-LAB 6. NGI ZERO 7. NGI POINTER 8. NGI ATLANTIC 9. NGI4ALL 10. NGI TETRA 11. ONTOCHAIN 12. ASSURE 13. TRUBLO |

4 MEASURES TAKEN

In order to address the above-mentioned challenges, the below measures were taken during the project:

TABLE 16: CHALLENGES AND TAKEN MEASURES

| Challenges addressed | Measures taken |
|--|--|
| Challenge-1: Covid-19 Pandemic | <ul style="list-style-type: none"> ○ Increase in the number of webinar sessions |
| Challenge-2: Lack of / unbalanced knowledge in IP | <ul style="list-style-type: none"> ○ Rearrangement of the webinar curriculum ○ Development of the IP Guides |
| Challenge-3: Misconceptions on IP: Open-source vs. free software | <ul style="list-style-type: none"> ○ Rearrangement of the webinar curriculum ○ Recruitment of external trainers/speakers ○ Development of the IP Guides |
| Challenge-4: Increasing need for information on open-source licensing models | <ul style="list-style-type: none"> ○ Rearrangement of the webinar curriculum ○ Recruitment of external trainers/speakers ○ Development of the IP Guides |
| Challenge-5: Limited participation of some of the NGI project participants | <ul style="list-style-type: none"> ○ Cooperation with other NGIs in the promotion of activities ○ Development of the IP Guides |

• Increase in the number of webinar sessions

To help narrow the gap in the level of IP knowledge of our diverse audience in various NGI projects and to align our services with the so-called “*new normal*” imposed by the Covid-19 pandemic, we radically increased the number of IP webinars when compared to the initial proposal.

Contrary to the previously planned seven IP webinars during the whole project period, we first planned to realise twelve (5 first period + 7 second period) IP webinars in total¹⁸. However, in the end, with the ten IP webinars in the second reporting period, the TETRA project overall organised 15 IP webinars instead of the proposed seven sessions (114% increase).

¹⁸ See TETRA project deliverable, D3.1. First report on IP Advisory p.22 para.2

- **Rearrangement of the webinar curriculum**

In response to the requests coming from our audience guided by the EU priorities, and to address the challenges on open-source licensing, we enriched our IP training curriculum with more open-source-related content such as open-source licensing, creative commons, software coding and IP, privacy and GDPR, etc. in our webinar programme.

In addition, in order to attract the new RIAs, the contents of our IP programme were enhanced in parallel with those RIAs (e.g. blockchain with ONTOCHAIN or NGI TRUBLO), and specifically designed sessions were organised for these specific NGI participants.

- **Recruitment of external trainers/speakers**

Being at the intersection of science and law, IP itself requires certain expertise which IPIL already has with its highly qualified staff, working in the different sorts of IP services for years.

However, open-source software and advanced IT-related IP service provision (e.g. IP and blockchain, IP and AI, IP and IoT, etc.) adds another dimension to the above requirements since these novel topics necessitate an in-depth IT knowledge in these very specific fields.

For this reason, and to address the complex and varied needs of our audience, IPIL reinforced its capacities with external experts and speakers who are experienced in these novel technologies. The recruitment process was carried out via IPIL's internal rules (i.e. through open calls).

- **Cooperation with other NGIs in the promotion of activities**

We are aware that promotion is at the heart of service provision. Therefore, IPIL together with all NGI TETRA consortium partners kept continuously in touch with other NGIs (CSA and RIAs) to increase the outreach of our services, collaborative promotion activities and service cooperation.

From that aspect, the following four IP sessions were (co-)organised together with the participant RIAs:

- *"Intellectual Property in the World of Blockchain"* on 02.06.2021 in cooperation with NGI Ontochain with 34 participants.
- *"Smart use of IP in the Next Generation Internet"* on 05.10.2021 in cooperation with NGI Pointer and NGI Zero with 30 participants
- *"An Introduction to IP for the NGI Community"* on 27.10.2021 in cooperation with NGI Essif-Lab and NGI Ledger with 18 participants
- *"Managing Open-source Software Licences"* on 10.11.2021 in cooperation with NGI Essif-Lab and NGI Ledger with 18 participants

• Development of the IP Guides¹⁹

In order to address the challenges on IP knowledge (challenges no. 2, 3 and 4), increase the outreach of our IP advisory service to all NGI beneficiaries even to the ones which we were not able to reach during the project term (challenge no.5), and to support the sustainable characteristic of the TETRA project, we have decided to develop two IP guides for the benefit of our NGI audience.

- “Frequently asked questions from IT developers” about IP Rights
- “Understanding the GDPR: Ten concepts IT developers should consider”


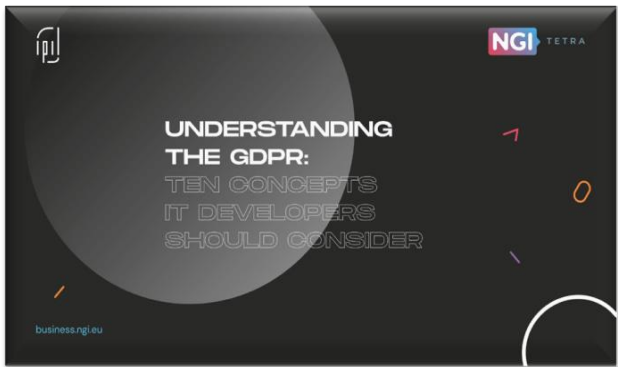
| | |
|---|---|
|  | <p>This guide aims to provide practical answers to the IP-related questions frequently asked by IT developers.</p> <p>It contains fundamental information about the main IP titles (trademarks, designs, patents, copyright) and open source software particularities.</p> <p>Can be accessed at: https://business.ngi.eu/online-resources-/useful-materials/intellectual-property-guide-for-it-developers/ </p> |
|  | <p>The guide aims to provide practical answers to the questions on data management asked by IT developers to help them integrate core GDPR principles into their IT projects.</p> <p>Can be accessed at: https://business.ngi.eu/online-resources-/useful-materials/gdpr-guide-for-it-developers/ </p> |

FIGURE 12: IP GUIDES DEVELOPED UNDER THE TETRA PROJECT

¹⁹ The announcement and promotion of these guides were made in the TETRA final meeting held on 8 June 2022 in Lisbon.

5 SUGGESTIONS AND TOOLS FOR EFFECTIVE MANAGEMENT OF IP

In addition to the guides developed under T3.1, the master plans (T2.3) included the below general recommendations and tools to help the teams better manage their intangible assets.

10 Recommendations for better management of your IP rights²⁰:

As a start-up company, you should take advantage of the benefits of safeguarding the assets you own by using the IP system as best as possible.

Undoubtedly, developing a sound IP strategy is a key for all businesses however it has vital importance especially for start-ups since the competitive business advantage of these young companies generally lies on novel technologies and inventions. For this reason, it is essential to consider IP beforehand and position your IP strategy as an integral part of your overall business strategy.

So, here are the 10 recommendations for taking the right IP measures for your business.

- 1. Do not disclose any of your IP assets (e.g. inventions, know-how, designs, trade marks, etc.):** *Any disclosure (e.g. during fairs; when discussing with potential partners such as financiers, technical partners, clients, etc.) might destroy the novelty character of your invention, which is mandatory for future patent or design protection). Besides, such a disclosure might cause you to lose your rights to register your trade mark since someone may file a same/similar trade mark, before you do so.*
- 2. Pay particular attention to copyright issues related to software:** *Ensure if you can legally use the material you integrated into your software code as it might be copyrighted. It is also important to confirm the compatibility between the licences under which software codes you are using. Also, do always check the national legislation as for software, some national legal frameworks might request to follow specific national rules/formalities for the protection of copyrighted material.*
- 3. Keep proofs of your documents related to your IP assets:** *It is always best to keep any evidence which may prove that you are the owner of the material developed and/or you developed that material on that particular date. For example, use systems like the Benelux IP Office's i-DEPOT, the APP in France, etc. that provide a time stamping to the material.*
- 4. Never underestimate trade mark protection:** *When marketing your product or service, remember that the name under which you will sell your product or provide your service is important. Therefore, it is recommended to check the availability of the name for your product/service to avoid any infringement issues with the identical/similar trade mark owners.*

²⁰ Text from the master plans provided to the bootcamp participant teams. The text was updated after the first bootcamp.

5. **Do not confuse trade mark registration with company name registration:** When you register your company to the trade registry, its name is only recorded as a corporate name, not as a trade mark. To get benefit from the trade mark rights, you should register your company name as a trade mark.
6. **Design rights are very useful when you would like to protect the aesthetical aspects of your products:** Design could also apply for some layout/graphical aspects of your product. It is also possible to register such a right.
7. **IP rights are territorial:** Your IP rights are limited to the territory(ies) of the country(ies) where they have been granted. Therefore, always foresee their registration in the markets you intend to target also in the future. Do always check the national rules.
8. **Check the IP databases before you file any registration:** Checking the IP databases might give you an idea about the registrability of your IP rights and may make you avoid unnecessary filing costs.
9. **Work with IP professionals:** Because of its specific nature, always seek professional support from IP professionals such as IP attorneys, IP lawyers, etc. They might be costly however, you may lose more if you file an unsuccessful IP application or face with an infringement issue.
10. **Join TETRA IP Webinars:** As NGI TETRA, we regularly organise IP webinars. Check our webinar calendar and join us!

Useful free IP databases and tools:

TETRA IP Guides: <https://business.ngi.eu/online-resources-/useful-materials/>

Patents:

- EPO Espacenet: <https://worldwide.espacenet.com>
- WIPO PatentScope: <https://patentscope.wipo.int/search/en/search.jsf>
- Google Patents: <https://patents.google.com>

Trade marks:

- EUIPO eSearchPlus: <https://euipo.europa.eu/eSearch>
- EUIPO TMview: www.tmdn.org/tmview/
- WIPO Global Brand Database: www.wipo.int/branddb/en

Designs:

- EUIPO eSearchPlus: <https://euipo.europa.eu/eSearch>
- EUIPO Designview: www.tmdn.org/tmdsview-web/
- WIPO Global Design Database: www.wipo.int/designdb/en/index.jsp

Proof/time stamping:

- BOIP iDepot: www.boip.int/en/idepot