



Knowledge Asset Management (KAM) Toolkit





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The Knowledge Asset Management (KAM) Toolkit

The KAM Toolkit is designed to help you to identify and manage your Intellectual Property (IP) and wider knowledge assets. It enables informed strategic decisions about the use and management of IP and knowledge assets, helping to identify, prioritise, and manage challenges, risks, and opportunities through a more deliberate and structured approach from the outset. The toolkit will help you to collect information and make connections relevant to your research projects and ideas.

The active recording and curation of this kind of information at the beginning of a research project helps to identify and manage knowledge assets and IP. Keeping the plan updated throughout a project means any changes to the underlying assumptions can be identified in a timely manner to mitigate risks or take advantage of any new opportunities.

A clear project scope helps to identify knowledge asset and IP risks and opportunities. It will help to plan resource allocation, identify areas of concern, and assess gaps in skills, infrastructure, and funding. It will also assist in contingency planning.



Use the KAM Toolkit to:

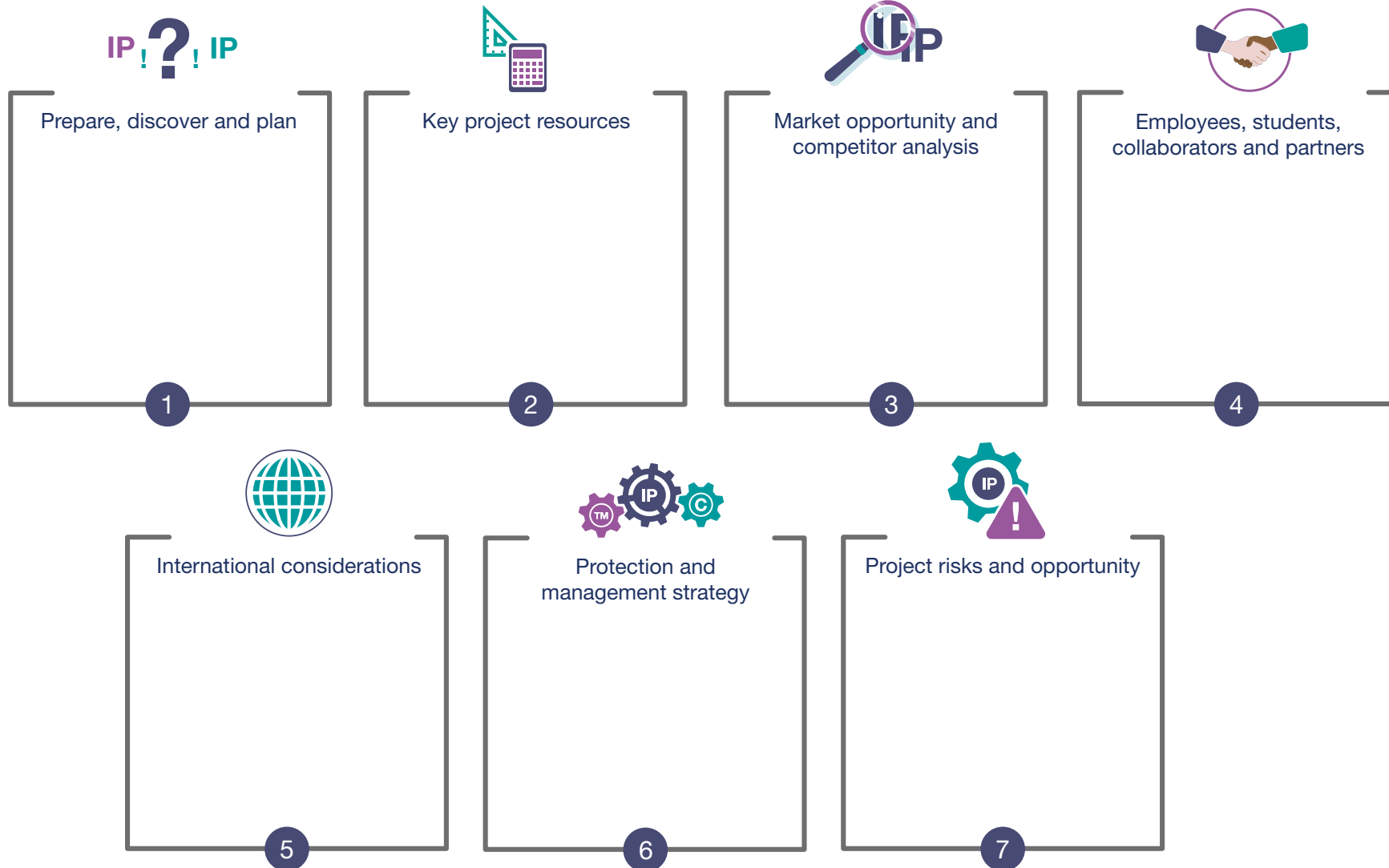
- actively manage knowledge assets and IP
- identify IP-related opportunities and risks within activities/projects
- make informed decisions about IP
- support conversations with key partners and stakeholders
- identify and summarise the key opportunities and risks
- plan how to achieve the benefits while working to reduce and avoid the risks

The accompanying planners can be used to begin to identify opportunities risks, benefits, strengths and weaknesses of the knowledge asset and IP strategy. This process will also help to clarify where more information may need to be gathered, where others need to be involved in discussions, and how to do that. It may also help to identify training needed to help answer those questions.

The planner should be a dynamic document that you regularly revisit and update.



Review date: _____



Prepare, discover and plan



Embed knowledge asset management within your project management practice. Align intellectual property and wider knowledge assets with project objectives, scope and stakeholders from the outset. Record and manage this information early to identify opportunities, mitigate risks and respond to change throughout the project lifecycle. At project close, ensure knowledge assets are preserved and documented, with clear ownership, obligations and rights identified. Manage these assets between projects, recognising that the same IP and wider knowledge assets may be used across multiple projects, contracts and collaborations.

- What is the scope, purpose, expected short-term outputs and long-term outcomes of the project for project stakeholders and wider society?
- Who will be involved in the project and what will each party contribute, and want to achieve?
- Are the project milestones and the expected date for completing the contract achievable?
- How does the project align with or impact institutional research priorities and reputation, governance and approvals?
- Where will the work take place?
- Will there be a transfer of people, materials, data or information?
- What knowledge assets, IP and IP rights are associated with this project, to whom do they belong and how will you have access to them?



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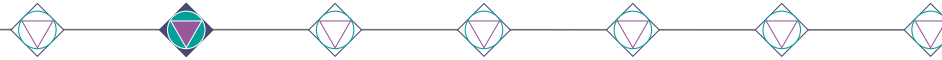
Here are some questions to help you consider knowledge assets and Intellectual Property (IP) in project plans.

Expand and adapt them as appropriate for your specific project context.





Key project resources



Ensure that you identify and consider the resources needed for a successful project. Assess any contractual considerations, including timing, ownership and costs, and monitor changes throughout the project.

- What resources, skills, and infrastructure, including ownership and terms of access are required?
- What tangible and intangible assets, including equipment, materials, and data, are needed for the project?
- Do you know who owns these assets and what are the terms of access?
- Can all team members access the required resources?
- Are there sector specific compliance obligations?
- Have you identified if there is any background IP and considered its ownership and conditions of use?
- Does the timeframe for access to resources align with project needs?
- How will IP assets be managed after the project ends?
- Are any IP assets excluded from the project?
- Do existing contractual obligations affect this project?
- Does your project rely on a third-party IP or have future dependencies?
- Do you maintain a knowledge asset and IP register to track and manage project assets?



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Market opportunity and competitor analysis



To ensure research remains relevant and avoids duplication, ensure that you analyse both academic and industry landscapes in the relevant technology area. Use market research to identify industry trends, emerging technologies, competitive dynamics, key researchers, licensing requirements, and potential collaborators.

- What is the current academic and industry landscape in the relevant research and technology?
- What are the prevailing industry trends, emerging technologies, and the competitive environment?
- Who are the leading researchers and what are their primary areas of interest?
- Who are the key competitors and potential collaborators in this field?
- Are there licensing requirements or restrictions for using specific technologies in the project?
- What background and foreground knowledge assets and IP are associated with the project?
- Who owns these knowledge assets and how is access managed?



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Link: The Patent Market Analysis Guidance provides early-stage guidance for using patent data for market research.





Employees, students, collaborators and partners



When collaborating, clarify the parties involved, the purpose and scope of the collaboration, their location, and ownership of research and IP assets. Check for any restrictions from institutional policies, contract terms, research requirements, and applicable laws. Collaboration or partnership agreements should define IP, data, and output ownership and set clear terms for use, publication, and commercialisation.

- Who are the collaborating parties, including any third-parties or sub-contractors?
- What are their core activities, regions of operation, and reputation, and is this compatible with the project and institutional mission?
- What contributions will they make, when and how will these be delivered, and do these align with institutional and funder policies?
- Are there any potential conflicts of interest?
- What are the terms of access and ownership of the project outputs, including knowledge assets, foreground and background IP, improvements and IP rights?
- Who needs access to those assets?
- Who needs access to knowledge assets, for how long and how will this be managed?
- What are the commercialisation or licensing arrangements?
- What is the financial position of each party in the project?



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International considerations



Before collaborating internationally, review the legal and IP landscape in relevant regions, as IP frameworks and approaches to enforcement vary by region. Ensure that you understand your project objectives, working practices, contracts and knowledge asset considerations within this context. Clarify arrangements for use and control of existing and new IP arising from the project, to mitigate risks, including loss of research outputs and IP.

- Who are the collaborators, partners and any associated third-parties or contractors?
- Where are they based and how might this affect your control, use and access to knowledge assets and IP?
- How will you protect your knowledge assets and IP?
- What contractual terms could impact existing knowledge and IP assets, and those arising from the project?
- What UK and international laws apply, such as export control and the UK's National Security and Investment Act, and what are the impacts of these on knowledge asset management?
- Are there any security/national security considerations?
- Are there additional legislative or procedural requirements to consider?
- How will knowledge and IP assets be managed during and after project?



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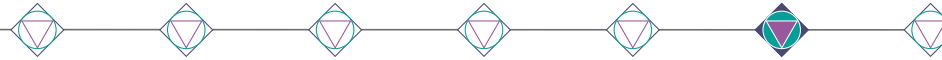
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Protection and management strategy



Safeguard your research by securing knowledge assets, IP rights, and controlling access to data and outputs. Implement robust information security measures and define clear processes for data sharing, database access, and ownership of any software or code developed.

Use contracts as a key protection tool in collaborations to establish ownership, use, confidentiality and responsibilities for research outputs, data and innovations. Ensure that contracts include IP provisions, confidentiality clauses, and conditions for use, dissemination, and commercialisation to reduce risk and prevent unauthorised use of research outputs.

- What are the data management protocols for storage, access and sharing?
- Are secure systems for data transfer and storage required?
- What is the process for identifying, protecting and managing knowledge assets and IP assets?
- What confidentiality clauses and procedures are required?
- What provisions govern publication, authorship, timelines, and approvals?
- What cybersecurity measures are required to protect your knowledge assets and IP?



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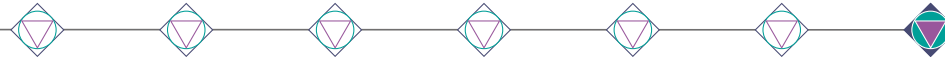
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Project risks and opportunity



This toolkit will have helped you identify both opportunities and risks relating to knowledge asset management in your research project. It is important to review these opportunities and risks as the project progresses.

To help you understand your options, realise potential benefits and mitigate risks, we suggest that you summarise the risks and opportunities in the below table.

Item for consideration	Opportunity	Risk
Prepare, discover and plan		
Key project resources		
Market opportunity and competitor analysis		
Employees, students, collaborators and partners		
International considerations		
Protection and management strategy		



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