



TERMS OF REFERENCE

INTELLECTUAL PROPERTY EXPERT

WP 5, T 5.5

7th of January 2026

Grant Agreement no. 101120690

Project full name:

Integrated EPB Assessments. A pathway for effective EPBD implementation.

Project acronym: **LIFE22-CET-iEPB**

Date of publication of the call: 7th of January 2026



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1. iEPB Project data

Project Acronym iEPB

Project Title Integrated EPB Assessments. A pathway for effective EPBD implementation.

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Project Duration October 2023 - September 2026 (36 months)

Work Package WP 5 – Sustainability, replication and exploitation of project results

Task T5.5 – Managing IP strategy and exploitation agreement among partners

Date: 7th of January 2026

Author: META Group

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2. Contracting Organisation

Contracting organisation

- Name: META Group Srl.
- Person Authorised to Act on Behalf of the Contracting Authority: Mr Andrea Di Anselmo.

Contact Person of the iEPB project

- Contact person for the iEPB project is:
- Mr Antonello Fiorucci: a.fiorucci@meta-group.com
- Mr. Edoardo Missiroli: e.missiroli@meta-group.com



3. Preamble

iEPB project

The LIFE iEPB project aims to support the effective implementation of the Energy Performance of Buildings Directive (EPBD) by increasing the synchronisation and coherence among multiple Energy Performance of Buildings (EPB) assessments. The project will develop a common and scalable data model that integrates existing EPCs with complementary instruments such as the Smart Readiness Indicator (SRI) and energy renovation recommendations. The approach will be tested in operational environments and coordinated with validated EPB assessment software used across different European Member States. iEPB will ultimately contribute to improved quality, harmonisation and market uptake of EPB assessments, supporting the transition toward more energy-efficient buildings across the EU.



4. Object of the assignment

Object

META Group Srl is publishing an Expression of Interest to select **one IP Expert** (the “Expert”) to support the implementation of the Work Package 5, Task 5.5 of the iEPB project.

The Expert (Patent Attorney and/or Attorney at Law) will provide **specialised IP support services** with a focus on the identification, assessment and protection of the **five (5) Key Exploitable Results (KERs)** generated by the project.

The assignment covers in particular:

- The execution of an **initial IP audit** for each of the five (5) iEPB Key Exploitable Results (KERs), including patent landscaping;
- The provision of **guidance on suitable IP protection strategies** for each KER and identification of potential risks and unfair advantages related to IP management and exploitation;
- The **formulation of tailored recommendations** for strengthening the beneficiaries’ IP strategy, including recommendations for ownership, protection and exploitation pathways.

Service description	Beneficiary(ies)	Tentative time of delivery	Expert Effort (person-days)
Initial IP audit for each KER, including patent landscaping. Guidance to KER owners about protection strategies. Delivery of tailored recommendations for protection and exploitation.	iEPB Project Partners	From the contract signature to (tentatively 19 th January 2026, to the 31 st of August 2026 (or 30 days before the date of the conclusion of iEPB project)).	30

The selection will be based solely on qualifications and experience, since the financial value of the assignment is fixed.

Deliverables and delivery procedures

The expert will deliver the following outputs as part of their assignment:

- **IP Audit Report:** Providing guidance on IP protection strategies, identifying risks and opportunities, and offering tailored recommendations to strengthen the beneficiary's IP strategy for each of the five (5) Key Exploitable Results (KERs).

All deliverables must be submitted in electronic format (PDF or Word) and must be clear, structured and suitable for internal distribution.

5. Deadline, contract duration & timing

This Expression of Interest is published on the META Group website and disseminated through META's public communication channels to ensure open and transparent competition.

Contract duration

The assignment is expected to run from the signature of the contract **to 31 August 2026** (or 30 days before the date of the conclusion of iEPB project).

For IPR support services, there will be a contract that can be renewed depending on the evaluations made by the iEPB team based on feedback collected from beneficiaries.

Renewal is possible only within the scope and budget foreseen under WP5/T5.5 and does not modify the financial value or substantially alter the assignment

The Contract duration cannot exceed September 2026, or the date of conclusion of iEPB project (if postponed).

Indicative Timeline for Deliverables

The Expert shall adhere to the following indicative timeline for the delivery of each report:

- **IP Audit Reports (KER 1 – 5):** delivered by 31 August 2026 (or 30 days before the date of the conclusion of iEPB project).

All deliverables are subject to review and approval by META Group and the project coordinator.

If deliverables do not meet expected standards, revisions will be required.

Monitoring and Periodic Feedback

The Expert will participate in periodic online meetings to present progress, receive feedback and make necessary adjustments. Regular communication will be required to ensure alignment with project expectations.



6. Economic conditions

Total value of the assignment

The total value of the assignment is **EUR 15,000** (fixed amount) + VAT¹ (if due).

This includes all fees, taxes and expenses of the expert.

Payment

- The Expert must submit an invoice detailing completed tasks and days worked.
- Payment will be made upon completion of the assignment and approval of the deliverables by META Group.
- Payments will be made within 30 days of receiving the invoice.
- No additional costs beyond the fixed total value will be accepted.

¹ Please check the VAT rates applied in your country: https://europa.eu/youreurope/business/taxation/vat/vat-rules-rates/index_en.htm

7. Eligibility and evaluation criteria

Eligibility and minimum professional requirements of the Expert

Only **natural persons** (individuals) are eligible to apply for this assignment.

The Expert (Patent Attorney and/or Attorney at Law) shall meet **all** of the following minimum **professional requirements**.

1. At least **10 years of professional experience** in IP strategy, patent landscaping, IP evaluation and related advisory services.
2. Demonstrated experience in **European R&I projects**, preferably with EU-funded collaborative actions.
3. Fluency in written and spoken **English**.
4. Capacity to **work remotely** and participate in **online meetings**.
5. **No conflict of interest** with iEPB beneficiaries or partners (declaration required before contract signature).

Providing proof of qualifications (eligibility) is a prerequisite for the evaluation of the expression of interest.

Scoring

The following scores apply for the required qualifications:

Evaluation criteria	Mean of evidence	Min score	Max score
1. Proven experience (at least 10 years) in the field scope of the assignment.	CV Europass, Annex I (Portfolio of Relevant Work – External IP Expert)	1	5
2. Experience in European R&I projects, preferably with EU-funded collaborative actions.	CV Europass	1	5
3. Fluent English	Certificates, academic qualifications, professional publications, or evidence of working in English in previous assignments, interview (optional)	1	5
Total max score: 15			

Minimum Threshold: Applicants must achieve a minimum total score of **12 points** to be considered eligible. Candidates failing to meet this threshold or lacking the required experience in European projects (at least 10 years), will not be considered for the next stage of the selection process.



8. Evidence required from applicants

Applicants must provide **documentary evidence** demonstrating compliance with the eligibility and evaluation criteria listed in Section 7. The following supporting documents in PDF are **mandatory/recommended**:

1. Detailed Curriculum Vitae in Europass format (mandatory)

The CV must clearly indicate:

- number of years of professional experience in IP strategy, patent landscaping or related fields;
- description of roles and responsibilities held;
- list of relevant assignments or engagements;
- explicit indication of involvement in European R&I projects, including project titles, roles and duration.

The CV is the primary document used to assess **seniority** and **relevance of experience**.

2. Portfolio of Relevant Work (mandatory) (Annex I)

Applicants must submit **at least three examples** of work demonstrating:

- IP audits
- patent landscaping or freedom-to-operate analysis
- IP evaluation or exploitation strategy development

Evidence may take the form of:

- redacted reports
- project summaries
- client letters or certificates
- public deliverables from EU-funded projects

3. Proof of English proficiency (optional but recommended)

Applicants may submit:

- Evidence of working in English in previous assignments.

If not provided, META will assess language proficiency based on:

- written quality of the EoI text
- interview (if META decides to conduct one)

4. Identification Document (mandatory)

A scanned copy of an ID card or passport to confirm the identity of the individual applying.

9. Evaluation and contracting

Evaluation

META Group will evaluate only complete applications submitted before the deadline. Each application will be assessed using the scoring grid in Section 7.

The evaluation procedure will follow these steps:

1. **Verification of eligibility** (mandatory requirements met).
 - If eligibility is not proven → *Application rejected*.
2. **Technical evaluation based on submitted evidence**.
 - Each criterion is scored from 1 to 5.
 - Scores must be justified in the evaluation sheet (one per applicant).
3. **Ranking of applicants** based on total score.
4. **Selection of the highest-ranked** eligible applicant.

For transparency and audit purposes, META Group will retain:

- all applications
- evaluation sheets
- the final ranking
- copies of declarations and evidence
- and proof of publication of the call

All applicants will **be informed** of the outcome of the selection process by email. The notification will include the ranking results and indicate whether the applicant has been selected, placed on the reserve list, or not retained. No individual evaluation scores will be disclosed, but applicants may request clarifications in writing within ten (10) calendar days of the notification.

The selected applicant will be immediately invited to sign the contract. The Expert is expected to start immediately after contract signature.

10. Deadline for submission and contents of the Expression of Interest

Submission of the Expression of Interest

The deadline for submitting the expression of interest is **20 January 2026 at 18:00 Central European Time (CET)**.

The expression of interest shall be submitted through the following Google form: https://docs.google.com/forms/d/e/1FAIpQLSfti2ZDqMv51h_5eSCCI0nQRNteeHCCnS4OYfgwR0Toyn-NmQ/viewform?usp=publish-editor

If any kind of support is needed, please write an email to e.missiroli@meta-group.com

*Please include in the subject of the e-mail the following: **External IP Expert's Expression of Interest.***

Content of the Expression of Interest

Each submission must include:

- CV Europass (mandatory)
- Annex I - Portfolio of Relevant Work – External IP Expert (mandatory)
- Annex II - Declaration of Honour (mandatory)
- Copy of valid Identification Document (mandatory)
- Proof of English proficiency (recommended)



11. Other Conditions

Coordination with the Contracting Organisation

The Expert will work under the conditions agreed with the Contracting Organisation.

The Expert will handle confidential and IP-sensitive information and shall treat all information received in the context of this assignment as strictly confidential.

The Contracting Organisation reserves the right to amend or modify conditions laid down in the present Terms of Reference.

The contractors shall be obliged to inform all parties about any amendment to the Expression of Interest documentation.

Requests for additional information (via e-mail) can be made on the following address:

Contact : e.missiroli@meta-group.com

Modification or Termination Procedure

The contract may be modified only by mutual written agreement between the parties, should unforeseen circumstances arise that justify such modifications. Any amendments to the terms of the contract must be documented in writing and agreed upon by both the contracting authority and the expert. Should the expert be unable to continue with the contract due to unforeseen circumstances, they must provide a notice period of at least 30 days. In the case of non-performance or failure to meet agreed deadlines, the contracting authority reserves the right to terminate the contract immediately, without prior notice, and seek a replacement expert if necessary.



12. Data protection

META Group processes the personal data submitted by applicants as part of the application (including, but not limited to, names, CVs, professional experience, email addresses, and any supporting documents) during the selection process for the Expert position.

The purpose of this data processing is to assess the suitability of candidates as experts for the evaluation of submissions for the Expression of Interest. During the selection process, personal data will be accessible to selected staff involved in the assessment and to other partners of the iEPB project who are directly involved in the selection process.

The personal data collected may also be shared with other parties in the context of audits or compliance checks, in accordance with the applicable rules and regulations.

The processing of personal data is carried out in compliance with Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data (General Data Protection Regulation - GDPR), and repealing Directive 95/46/EC.

Data retention: Personal data will be retained for as long as necessary to fulfil the purposes outlined above, and in accordance with the applicable retention policies of META Group and the iEPB project.

Rights of data subjects: Applicants have the right to access, rectify, or erase their personal data, as well as to object to or restrict processing in certain circumstances. Applicants may exercise these rights by contacting META Group at the provided contact details.

13. Annexes: Templates for submission

Annex I – Portfolio of Relevant Work – External IP Expert

Applicants must provide at least three examples of relevant prior work demonstrating experience in IP audits, patent landscaping, IP evaluation, IP exploitation strategies.

Title of Assignment: _____ Client / Organisation: _____ Year(s): _____ Description of Work Performed (max. 200 words): Document Attached? ☐ Yes ☐ No
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Title of Assignment: _____ Client / Organisation: _____ Year(s): _____ Description of Work Performed (max. 200 words): Document Attached? ☐ Yes ☐ No
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Title of Assignment: _____ Client / Organisation: _____ Year(s): _____ Description of Work Performed (max. 200 words): Document Attached? ☐ Yes ☐ No
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Add examples as needed



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Annex II – Declaration of Honour – External IP Expert (iEPB Project)

I, the undersigned, hereby declare on my honour that:

- 1) I am applying as a **natural person** for the position of External IP Expert under the Expression of Interest published by META Group Srl for the LIFE22-CET-iEPB project.
- 2) I fulfil all eligibility requirements as specified in the Terms of Reference, including:
 - minimum **10 years of professional experience** in IP strategy, patent landscaping or related fields;
 - **experience in European R&I and/or EU-funded projects**;
 - fluency in **English**.
- 3) I have provided **accurate, complete and truthful information** in my application.
- 4) I am not in any situation that could constitute a **conflict of interest** with the iEPB project, its beneficiaries or META Group Srl.
- 5) I commit to maintaining **full confidentiality** regarding all information received during the assignment.
- 6) I **accept all conditions** described in the Terms of Reference.
- 7) I acknowledge that **providing false information may result in exclusion from the procedure or termination of any contract awarded**.

Place: _____

Date: _____

Signature: _____

