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Research Exploitation

Strategic Intelligence
Strategies
Business Models



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Prague, 11 May 2017


Get your ticket to innovation.



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Getting to Impact!

- Understanding the Landscape
 - Strategic Intelligence
- To plan the route to get where you want to go
 - Strategies and plans for Dissemination and Exploitation
- Choosing the best vehicle to get you there
 - "Exploitation"/Business Models



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The H2020 Work Programme

Clearly describes the challenges and expected impacts


SC1-PM-17-2017: Personalised computer models and in-silico systems for well-being

Specific Challenge:

- ..There is continuous progress in systems medicine, multi-scale modelling and patient-specific modelling aspects, but..... **there are very few** in well-being, prevention or rehabilitation ... More, innovative methods **are needed** for better understanding and analysing brain, neurobiological ...etc

Expected impacts:

- New personalised interventions for increasing resilience ...
- Advancements in medical computer-modelling ...
- Predictive and preventive approaches in medicine...
- Improving knowledge about well-being ...




Data > Intelligence > Strategies & Plans

1. Gather information to understand all aspects of the landscape (market, technical, IPR, SOTA, Competitors, etc)
2. Analyse the information to obtain strategic intelligence... to allow you to: -
3. **Plan to deliver** – develop strategies and plans to **create the project outputs and get them used** (exploited) for maximum impact:
 - Strategy and plan to create the project results
 - **Strategy and plan for dissemination and exploitation**



Information Sources

- Academic Sources
 - publications, conference proceedings
- Industry Sources
 - Market reports
 - Industry partners
 - Company websites, annual reports (incl. financial)
 - Industry publications, events, conferences and exhibitions
- Influencers
 - Policy papers
 - Technical reports and white papers
- External Drivers or constraints
 - Regulations
 - Standards bodies (CEN/CENELEC, ISO, ETSI, National Bodies)
 - Patents and other registered IP



Why Patent Information?


- The **largest** freely available technical publication resource
- Patents are often the **only** publication on a subject
- Patents are usually the **first** publication
- **Large** resource : 80+ million documents
- **Growing** Rapidly : 2 applications every minute



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Strategic Intelligence from Patents

- State of the Art
- Freedom to use
- Potential new technology areas
- Key players – now and who is looking for the future!
- Market Intelligence
- Competitor Intelligence
- Technology Intelligence
- Finding research and/or commercialisation partners



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Patents

Highly structured and classified


- Technical classification
 - 60,000 IPC (International) classes
 - 120,000 ECLA (European) classes
 - 250,000 CPC (Cooperative – EPO and US) classes
- Time and region classification
 - reveal trends over time
 - geographical activity – past, present and future!




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Free patent searching

- European Patent Office – Espacenet
 - www.espacenet.com
- World Intellectual Property Organisation – Patentscope
 - patentscope.wipo.int
- Google patent
 - www.google.com/patents
- National patent offices




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Strategic Intelligence

- What has already been done – by who?
- Who is working in this area?
- Find partners (research or commercial)
- Check freedom to operate



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Patent search

Search

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Help

Strategic Intelligence


Espacenet: free access to the database of over 80 million patents

GPI - Global Patent Index

Espacenet Index



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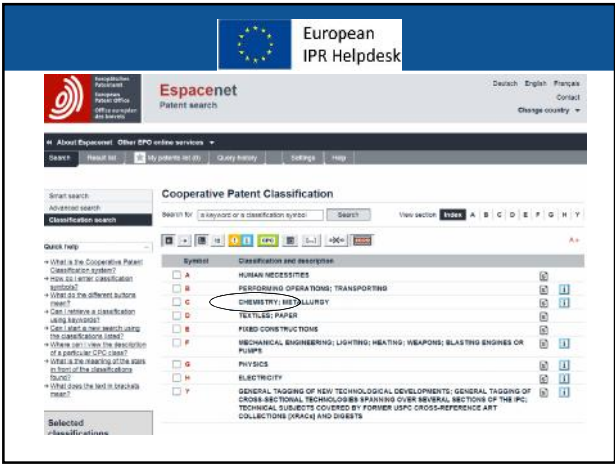
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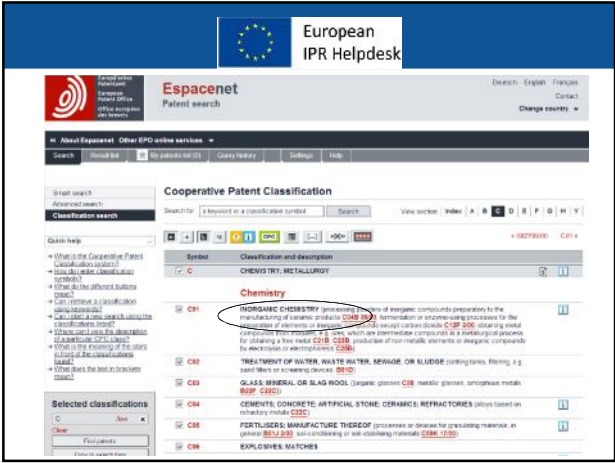
Result list

Search


Result list

Advanced search









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Result list

1 2 3 4 5 6 7 8 9 10

1 2 3 4 5 6 7 8 9 10

Approximately 7300 results found in the IP-Office database for:
 OR:48589844 OR:2 OR:48589844 OR:2 OR:48589844 OR:2
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1. PROCESS FOR PREPARING ADVANCED CERAMIC POWDER USING CHINA DIBROMOXYLATE

Inventor:	Applicant:	IPC:	Publication Info:	Priority dates:
MARBLE WILFRED WILFRED	SACHEM INC. (US)	CPC: C04B 35/48 C04B 35/483 C04B 35/485 C04B 35/487 C04B 35/489 C04B 35/491 C04B 35/493 C04B 35/495 C04B 35/497 C04B 35/499 C04B 35/501 C04B 35/503 C04B 35/505 C04B 35/507 C04B 35/509 C04B 35/511 C04B 35/513 C04B 35/515 C04B 35/517 C04B 35/519 C04B 35/521 C04B 35/523 C04B 35/525 C04B 35/527 C04B 35/529 C04B 35/531 C04B 35/533 C04B 35/535 C04B 35/537 C04B 35/539 C04B 35/541 C04B 35/543 C04B 35/545 C04B 35/547 C04B 35/549 C04B 35/551 C04B 35/553 C04B 35/555 C04B 35/557 C04B 35/559 C04B 35/561 C04B 35/563 C04B 35/565 C04B 35/567 C04B 35/569 C04B 35/571 C04B 35/573 C04B 35/575 C04B 35/577 C04B 35/579 C04B 35/581 C04B 35/583 C04B 35/585 C04B 35/587 C04B 35/589 C04B 35/591 C04B 35/593 C04B 35/595 C04B 35/597 C04B 35/599 C04B 35/601 C04B 35/603 C04B 35/605 C04B 35/607 C04B 35/609 C04B 35/611 C04B 35/613 C04B 35/615 C04B 35/617 C04B 35/619 C04B 35/621 C04B 35/623 C04B 35/625 C04B 35/627 C04B 35/629 C04B 35/631 C04B 35/633 C04B 35/635 C04B 35/637 C04B 35/639 C04B 35/641 C04B 35/643 C04B 35/645 C04B 35/647 C04B 35/649 C04B 35/651 C04B 35/653 C04B 35/655 C04B 35/657 C04B 35/659 C04B 35/661 C04B 35/663 C04B 35/665 C04B 35/667 C04B 35/669 C04B 35/671 C04B 35/673 C04B 35/675 C04B 35/677 C04B 35/679 C04B 35/681 C04B 35/683 C04B 35/685 C04B 35/687 C04B 35/689 C04B 35/691 C04B 35/693 C04B 35/695 C04B 35/697 C04B 35/699 C04B 35/701 C04B 35/703 C04B 35/705 C04B 35/707 C04B 35/709 C04B 35/711 C04B 35/713 C04B 35/715 C04B 35/717 C04B 35/719 C04B 35/721 C04B 35/723 C04B 35/725 C04B 35/727 C04B 35/729 C04B 35/731 C04B 35/733 C04B 35/735 C04B 35/737 C04B 35/739 C04B 35/741 C04B 35/743 C04B 35/745 C04B 35/747 C04B 35/749 C04B 35/751 C04B 35/753 C04B 35/755 C04B 35/757 C04B 35/759 C04B 35/761 C04B 35/763 C04B 35/765 C04B 35/767 C04B 35/769 C04B 35/771 C04B 35/773 C04B 35/775 C04B 35/777 C04B 35/779 C04B 35/781 C04B 35/783 C04B 35/785 C04B 35/787 C04B 35/789 C04B 35/791 C04B 35/793 C04B 35/795 C04B 35/797 C04B 35/799 C04B 35/801 C04B 35/803 C04B 35/805 C04B 35/807 C04B 35/809 C04B 35/811 C04B 35/813 C04B 35/815 C04B 35/817 C04B 35/819 C04B 35/821 C04B 35/823 C04B 35/825 C04B 35/827 C04B 35/829 C04B 35/831 C04B 35/833 C04B 35/835 C04B 35/837 C04B 35/839 C04B 35/841 C04B 35/843 C04B 35/845 C04B 35/847 C04B 35/849 C04B 35/851 C04B 35/853 C04B 35/855 C04B 35/857 C04B 35/859 C04B 35/861 C04B 35/863 C04B 35/865 C04B 35/867 C04B 35/869 C04B 35/871 C04B 35/873 C04B 35/875 C04B 35/877 C04B 35/879 C04B 35/881 C04B 35/883 C04B 35/885 C04B 35/887 C04B 35/889 C04B 35/891 C04B 35/893 C04B 35/895 C04B 35/897 C04B 35/899 C04B 35/901 C04B 35/903 C04B 35/905 C04B 35/907 C04B 35/909 C04B 35/911 C04B 35/913 C04B 35/915 C04B 35/917 C04B 35/919 C04B 35/921 C04B 35/923 C04B 35/925 C04B 35/927 C04B 35/929 C04B 35/931 C04B 35/933 C04B 35/935 C04B 35/937 C04B 35/939 C04B 35/941 C04B 35/943 C04B 35/945 C04B 35/947 C04B 35/949 C04B 35/951 C04B 35/953 C04B 35/955 C04B 35/957 C04B 35/959 C04B 35/961 C04B 35/963 C04B 35/965 C04B 35/967 C04B 35/969 C04B 35/971 C04B 35/973 C04B 35/975 C04B 35/977 C04B 35/979 C04B 35/981 C04B 35/983 C04B 35/985 C04B 35/987 C04B 35/989 C04B 35/991 C04B 35/993 C04B 35/995 C04B 35/997 C04B 35/999 C04B 36/001 C04B 36/003 C04B 36/		

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Free virtual online classroom sessions: "Introduction to EPOsearch"

EPOsearch is a new service for our most valued customers. Sessions will now place and 4 September 2016 at 13:00 h 15:00 h. The topic will be an introduction to EPOsearch which is registered.

EPOsearch and find out more about our free online virtual classroom sessions.

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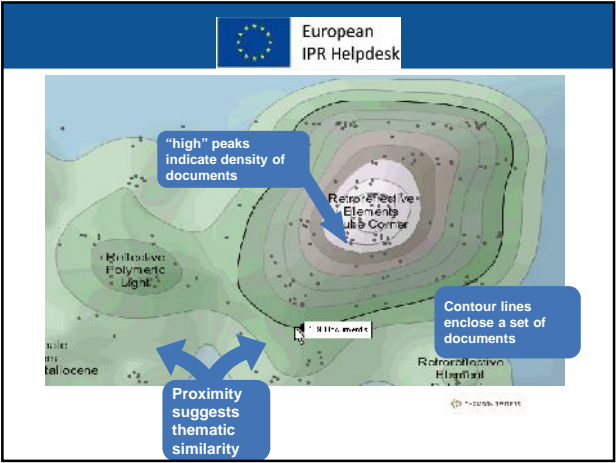
[Cooperative Patent Classification: \[GPO\]\(#\)](#)




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80 million patents !!

- Rigorously structured and classified
- Analysis and Visualisation Tools can help





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Help and Support
EPO (European Patent Office) **PATLIB** Centres
<http://www.epo.org/searching-for-patents/helpful-resources/patlib/directory.html>

Directory of public information services (PATLIB)

Centres by country


- Albania
- Austria
- Belgium
- Bulgaria
- Czechia
- Denmark
- Estonia
- Finland
- France
- Germany
- Greece
- Hungary
- Ireland
- Italy
- Latvia
- Lithuania
- Malta
- Netherlands
- Poland
- Portugal
- Romania
- Slovakia
- Slovenia
- Spain
- Sweden
- Switzerland
- Turkey
- United Kingdom
- USA

Centres by IP rights covered

- Design
- Patent
- Registered trademark
- Trade mark
- Utility model

Centres by service

- Access to patent information
- Assessment of the economic potential of an invention
- Commercialisation of IP rights
- Patent clinics
- Statistical analyses of patent data
- User training
- Assessment of the economic potential of an invention
- Commercialisation of IP rights
- Patent clinics
- Statistical analyses of patent data
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Summary


- Patent information is a valuable source of information and strategic intelligence –
- ..to help **understand the landscape**
- ..and to build **strategies and plans** for
 - Knowledge Management
 - Dissemination and Exploitation



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Developing exploitation
strategies
..and Dissemination and
Exploitation plans



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Dissemination and exploitation

"Your plan for the dissemination and exploitation of the project's results is key to maximising their impact."
(from H2020 proposal template)



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Key Points..

- Main project results appear at the end of the project
 - So, there must be a credible "plan" after the end of the project
- Most project participants are not innovators who will take results to market
 - So take-to-market partners must be found

The DEP is not (usually) a plan for the partners to develop innovations



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More Key Points..

- The project is about addressing call challenges!
- Ensure the DEP focuses on the whole project results, which address the challenges of the call
- Do not be distracted by describing how partners will individually disseminate or exploit their own results

Don't let it all end with fragmentation and dissemination!!



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More Key Points..


- Dissemination and exploitation go together
- It's a Dissemination AND Exploitation Plan
 - not 2 independent plans!
- Exploitation drives dissemination - and vice versa




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More Key Points..

- Project results are often early stage, and more work is needed to convince “investors” or partners
- Many research groups are working on the same challenges, so collaborate with others to build a more credible exploitation package



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What should a DEP contain?



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What have you got and what do you need?

- Project IP - What are the (expected) project results (IP)?
- IP Rights
 - Would IP Protection support commercial exploitation?
- Other assets
 - What other assets do you have (knowledge, facilities, etc)
 - What other assets are needed (background, 3rd party, etc)
- How will the assets be bundled to address the specific challenges of the call and contribute to the expected impacts?



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The offer(s)

Different “offers” to different targets

- Who are the main target groups/markets?
 - What needs will be addressed?
 - What benefits will they get?
 - Why it better than the competition?
- What is the offer (bundles of assets) for each group?
- What are the objectives for each target group?
- What are the messages for each target group?
- How will you communicate the messages and follow up any interest?

Plan to address the specific challenges and maximise the expected impacts of the call



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Can you make a convincing case?

- How will the project results benefit the target groups (commercial partner, investor, policy maker, etc.)?
- Not only technical benefits - economic, social, environmental can all contribute to strengthening the prospect's competitiveness and growth, or satisfying a need
- For investors, particularly, growth and exit routes (in say 5 years) is important
- Even if the technology is smaller, faster, more robust, cheaper to make – it may not be a good business prospect



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What route(s) will you take?

- What must happen to get the project results used (and deliver the impact)?
- Is any further work (investment/funding) envisaged to convince your targets (e.g. proof of concept/scale-up)?
- What barriers or enablers are on these routes (standards, IPRs, regulatory, ethical, etc.)?
- How will they be addressed (by you or your take-to-market partner)?

Understand the landscape and plan the routes




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How will you get there?


- What will the exploitation vehicle(s) be?
- How will your results be accessed and used (e.g. new company, licence, JV, institution, etc.)?
- What are the expected terms for access and use?

Likely to be after the project ends


So plan must be credible!



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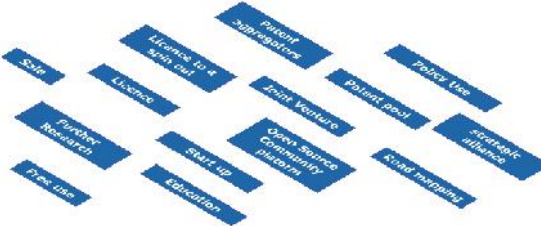
Exploitation Strategies and Business Models



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Extracting value..

- Project outputs are valuable assets which, like physical property, can be used and traded – bought, sold or leased, used in JV's, or as collateral
- But, unlike physical property there are many more ways of extracting value...



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License or Start-up?

- Licensing - licensee **has expertise and resource**
 - Takes advantage of the expertise, resources and market know-how of companies already operating in the field.
 - Can address different fields of use and geographical areas
- Start-up – **must acquire expertise and resource**
 - A critical mass of expertise (management, financial, sales, marketing, manufacturing, technical, administrative), and an committed and enthusiastic team

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License or Start-up?

- **Same objectives – different routes**
- **Who is in the best position to develop, “productise” and get project outputs used?**
 - Further development?
 - Regulatory approvals?


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Licensing?

Granting the right to use your property (results) under certain agreed terms and conditions, such as

- Territory
- Field of use
- For a limited time
- For evaluation only
- Provided you do a good job with it!
- Etc

NB: Can the SME Partner(s) reach all market sectors and territories?



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Licence or Start-up?

Licence		Start-up/Spin-out
Established markets and suppliers	vs	New market for new suppliers
Evolutionary/incremental technology	vs	Revolutionary or platform technology
The IP fits a gap in someone else's portfolio	vs	The IP can deliver a unique, independent business advantage
The IP is a one-off stand-alone invention	vs	There is a pipeline of potential products
Can have early returns	vs	Returns take longer



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Summary

- Understand the **whole landscape**
- Focus on addressing **call challenges and expected impacts**
- Identify your **targets** (with objectives and messages)
- Assemble the **best exploitation offer(s)** for targets
- Understand the **exploitation roadmap(s)**
- Know the **exploitation vehicle(s)**
- Convince "take-to-market" partners/investors
- .. and **get project results used**

Only with **use** will the challenges of the Call topic be addressed and **expected impacts** achieved



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