

C5

IP Strategy



Goal	The aim of the course is to help PhD students deepen their understanding and awareness of the intellectual property and further develop their competence in working with the IP and exploiting the potential of the IP.
Format	Seminars + hands-on tutorial + exercises
Recommended duration	3 hours
Content of the training activity	<ol style="list-style-type: none">1. What is an IP Strategy, Purpose, Benefits2. Lifecycle of IP Strategy3. General strategy frameworks & approach4. IP tasks specifications5. Alignment with corporate policy and corporate culture6. Potential risks/Pitfalls7. IP Protection Strategy<ul style="list-style-type: none">• Area, Time, Budget• Patent Portfolio Range8. IP Strategy Toolkit & Timing<ul style="list-style-type: none">• Analytics & Analysis• Internal Processes• Timing• State of the art searches
Expected learning outcomes	<p>After taking this course/training activity, the PhD student should be able to:</p> <ul style="list-style-type: none">• Build basic knowledge of IP Strategy,• Acquire experiences in working with patent databases,• Learn how to choose the best way of protecting their research results,• Acquire fundamental knowledge of tools for mining information based on which [s/he] is able to make decisions,• Know what to look out for and avoid risks,• Build strong IP portfolio in line with the business strategy. <p>Attendees will benefit from the acquired knowledge for example by being able to perform search in patent databases as a complementary extension to the search in scientific journals and databases. The patent databases provide eminent information on the current state of art in technology. Another tools (such as IP Landscape) show space for commercialization.</p>

<p>Link to career opportunities in life-sciences</p>	<p>From a short-term perspective, attending the training will help the students to deepen their understanding and awareness of the intellectual property, that is of everyday concern in the scientific work. The expected learning outcomes when acquired will allow students to explore new opportunities in their post-gradual work as they will become capable of planning IP strategy and think about potential patentability of their work.</p> <p>In a long run, the former PhD students may e. g. want to build a start-up or spin off based on their PhD work, or they may join a new laboratory where these activities will be accentuated. It is important to note, that start-ups and spin-offs gain increasing importance in as the main strategy for SMEs announced by European Commission (EC). The EC for example recently announced support for the Venture Centre of Excellence programme, which is a first of its kind open innovation platform in the Life Science sector in Europe aimed at fostering collaboration and investment sharing between the venture capital industry and corporates in order to boost investments in highly innovative digital health and life science start-ups. Acquired knowledge and skills will be useful for a wide range of positions in life sciences, above all such as:</p> <ul style="list-style-type: none"> ● biotechnology which researches and develops the use of biology to solve problems in areas such as health care, the pharmaceutical and chemical industries, agriculture, food production and environmental protection; ● industrial pharmacy that is involved in the discovery and development of safe, effective drugs and medicines and where the students can work at any stage of the process, including research, development, clinical trials, overseeing production, quality testing, marketing and applying to have the drug legally registered; ● biochemistry where new products and processes are researched and developed to benefit a wide range of areas, including food processing, pharmaceuticals, health care and agriculture. <p>Working on a position in any of the above-mentioned areas of life sciences may require certain level of knowledge from the IP.</p>
<p>Sector specifics to be considered</p>	<p>The issues of patenting in the medical and biotech sector should be reflected in the example of Patent portfolio range.</p>
<p>Recommended further steps</p>	<p>Implementation of further seminars/webinars with focus on:</p> <ul style="list-style-type: none"> ● More detailed work with various patent databases ● WIPO Guides for Inventors and Entrepreneurs: <ul style="list-style-type: none"> ● www.wipo.int/sme/en/checklist.html ● Identifying Inventions in the Public Domain www.wipo.int/publications/en/details.jsp?id=4501 ● Using Inventions in the Public Domain www.wipo.int/publications/en/details.jsp?id=4502
<p>Trainer/facilitator qualification</p>	<p>The trainer should have practical experience in the field of technology transfer, ideally at least partial experience with IP strategy creation in start-ups or small and medium enterprise.</p>

Recommendations and suggestions for course/activity setup and methods used:

	Duration	Activity description
Course/activity set-up and methods used	5 min	Quiz about IP Basics (types of protection)
	5 min	One "homework" presentation on the topic: Imagine you have an invention (and perhaps start-up). What will you do next with it?
	80 min	Lecture
	30 min	Demonstrations of searching for patent information The lecturer should have prepared at least 1 practical examples of searching in the Espacenet and Patent Scope.
	60 min	Practical exercises We recommend dividing students into groups of one to four and assigning them a task — creating an IP Strategy. This can be based on the specific case of a member of the group, or the lecturer will give them a model exercise.
	Recommended number of participants	Min: 5 Max: 30
Forms of active engagement	<p>The course might start with a quiz (e. g. via Kahoot) and discussion to refresh the knowledge about the basics of IP.</p> <p>Participants can be asked to present their ideas and steps they would take to protect them.</p> <p>The lecturer should demonstrate the search for patents in the Patent Databases. Demonstrations should progress so that students can actively repeat lecturers' actions and achieve the same results on their smart devices. They should discuss the achieved results.</p> <p>In the final part of the course, students should create an IP Strategy individually or in the groups. If some students do not have a specific idea or technology ready, lecturer should provide them with some suggestions. The lecturer and other participants should provide feedback.</p>	
Recommended pretraining activities	<p>Participation in the course "Basics of IP protection".</p> <p>Individual homework assignment before course on the topic: Imagine you have an invention (and perhaps start-up). What will you do next with it?</p>	
Training handouts	Presentation (printed or electronic document (PDF))	
Reflection questions	<ul style="list-style-type: none"> ● What is the purpose of creating an IP Strategy? ● Is IP strategy a one-time affair? ● What IP-related aspects should be considered in create strategy? ● What does FTO stand for? ● When is it necessary to deal with intellectual property? 	
Engagement of external experts	Involvement of external experts with practical skills in creating an IP Strategy is an added value.	
Venue requirements	<ul style="list-style-type: none"> ● WIFI connection for all participants and possibility to connect chargers for smart devices ● Possibility for participants to sit at the table and in groups 	

Technical and material requirements	Computer and data projector. Notebook/PC for every individual/group of students.
Resources to explore	Required resources: <ul style="list-style-type: none">● A step-by-step IP Strategy Checklist for SMEs www.wipo.int/sme/en/checklist.html● Top 10 Intellectual Property mistakes made by SMEs and entrepreneurs: www.wipo.int/sme/en/top-10-intellectual-property-mistakes-smes-entrepreneurs.html