



Stages of Preparation and Tasks Associated with Preparing Patent Landscape Reports

Irene Kitsara

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IP Information Officer, Access to Information and Knowledge Division

Profile of Patent Landscape Reports users

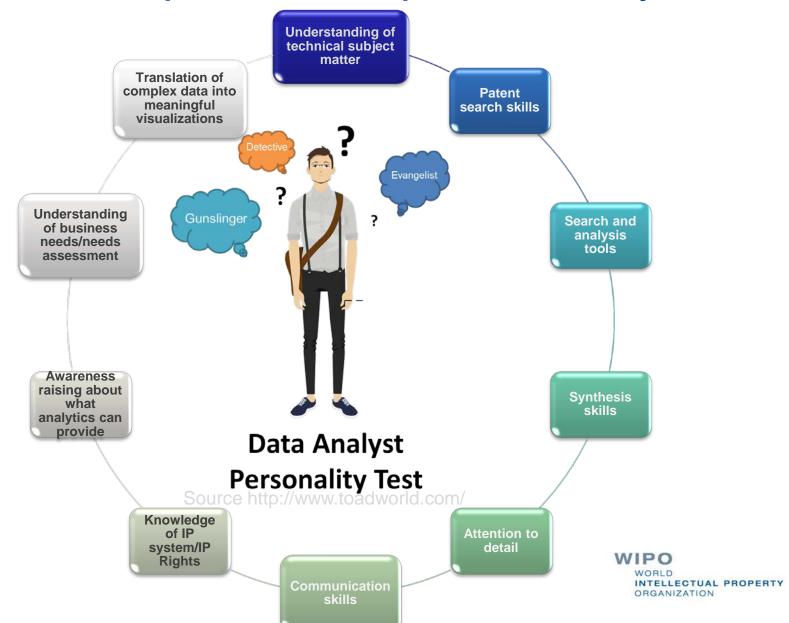
Industry: standard procedure included in decision making mechanism (patent portfolio management, R&D investment and prioritization, technology transfer etc)

Public sector:

- Providers: National Patent Offices/research institutes preparing reports in areas of general interest/specific need or providing landscaping services to the public
- Users: awareness raising phase more and more public institutions seeking ways to facilitate their policy discussions and similar to the private sector decisions

WORLD INTELLECTUAL PROPERTY ORGANIZATION

What is the profile of a patent analyst?



STAGES OF PREPARATION OF A PATENT LANDSCAPE REPORT



Different scenarios in the preparation of a Patent Landscape Report (PLR)

- PLR prepared in-house or contracted out? (internal or external clients?)
- Purpose of the report (business intelligence / competitor analysis or to serve public interest?)
- Decision involved
- Profile of client/team involved













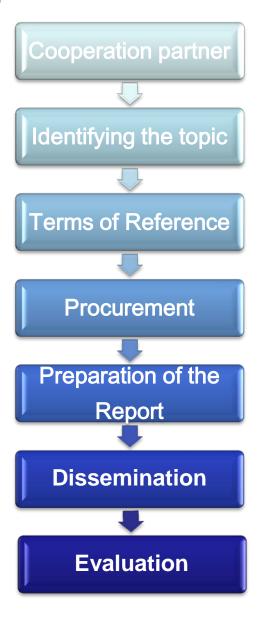
Manager

Market Analyst





Stages in preparation of a WIPO PLR





What the cooperation partners are looking for

- Factual evidence to facilitate policy discussions and various decisions (R&D prioritization, technology transfer etc)
- IP Perspective of a technical/policy issue
- Awareness on IP relevance and added value information deriving from patent data



Who our cooperation partners are

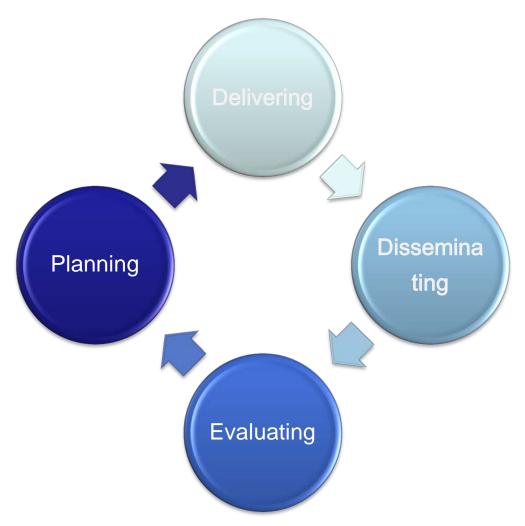


What a typical PLR user is looking for

- Confirming he is not re-inventing the wheel
- Identifying areas of interest for R&D or investment
- To patent or not to patent? Keep/abandon IPR?
- Monitoring the activity of his competitors
- Identifying cooperation partners
- Identify potential markets
- Evaluate his own portfolio or a third party's patent portfolio



The lifecycle of a Patent Landscape Report





It all starts with...Planning

Within WIPO Development Agenda, CDIP4/6:

"Project aims to provide developing countries, ...upon request, with services which will facilitate the use of patent information on specific technology for facilitating their indigenous innovation and R&D in cooperation with other intergovernmental organizations"

but....

"A goal without a plan is just a wish."

Antoine de Saint-Exupéry"



Planning a Patent Landscape Report

Selecting a cooperation partner

Identifying a topic

Planning: maybe the most timeconsuming, but essential part

Preparing ToR

"Give me six hours to chop down a tree and I will spend the first four sharpening the axe." (Abraham Lincoln)

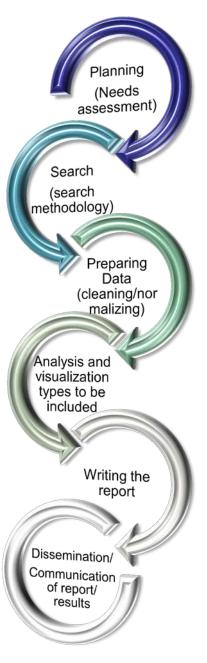
Call for Tender

Offer evaluation & Contracting



Stages in preparation of a typical PLR and

related tasks





Planning/Needs assessment

- Understanding the client's business need, decision in question, the information which would be relevant
 - Brainstorming, discussion, posing a series of questions allowing for the client to better define his needs
 - Explaining options and limitations of patent landscaping
 - Timelines and feasibility
 - Sufficient background information
 - Ideally: interdisciplinary discussions (joint meetings of management, lawyers, R&D, business analysts, intelligence and patent information team)
 - Defining the scope of the report, the type of analysis that is useful and appropriate reiterative processioneed for intermediate discussions, redefinition of scope eterion

Challenges in the planning phase

- Too abstract understanding of what a PLR is
- Difficulties in needs assessment often Socratic Method used
- Lack of clarity about which type of analysis that is needed or exact scope of the search makes drafting the ToR very difficult
- Lengthy process of dialogue, exchange of ToR drafts, refinements, changes
- The client should be aware of the limitations of the patent information
- Requests may just need a state of the art search or be too generic need for awareness raising often about what landsacaping can offer and then cases when it is appropriate

Patent (and non-patent) search

- Selection of databases, search methodology crucial for the quality of the data:
 - Required geographical and historical coverage
 - Languages and MT tools
 - Appropriate patent search strategy based on
 - scope of the report (precision&recall)
 - use of the report
 - subject matter in question
 - preliminary search



Data cleaning/normalization

- The challenge of messy data varies based on system where it is exported from and format
- Name variations and misspellings
- Cleaning of office of second file data
- Numbers normalization
- Need of name (applicants/inventors) normalization and grouping (by affiliation, M&A information etc)
- Definition of needs and choice of tools
- If the dataset comes from different sources, follow the same approach throughout the table/data
- Based on system/tool used: manual or semi-automatic



Analysis and visualization of the clean data

- Tools, visualization and analysis types to be chosen
- Dimensions to be reflected on a visualization (2 or 3 or more)
- Clustering of technology areas, components, applications, applicant/inventor profile, geographical areas
- Expression of results over time, geographies
- Combination of patent with non-patent data
- Consultation with the client throughout this and the writing phase essential to confirm that it serves their needs – preliminary results and analysis can trigger need for refinement of search or additional analysis



Preparation of the report and Communication of the results

- Report style, language, length etc. should be adapted to the target audience
- Big challenge: address the results to multiple profiles (lawyers, managers, scientists). A dedicated area of the report serving each and every one's need most appropriate
- The report should be easy to read, the messages and results clear and the visualizations intuitive and meaningful
- An accompanying Infographic, a story-telling approach (e.g. Tableau), a dashboard may be more appropriate based on specific objective of the report
- The report should be time-saving for the client and useful



Evaluation of the report

- Evaluation: feedback from the client and lessons learned essential for improvement
- Important also to measure the impact of the report in the decision-making mechanism
 - Sometimes the increase in requests is a good indicator of qualitative results and satisfied clients



Matching the tasks with the tools

Tasks and Tool types

- General Tools
- Search tools
- Cleaning
- Text/data mining
- Data Visualization
- Geographic Mapping
- Network visualizations
- Infographics

Notes

- One tool suits all?
- Some tools address multiple tasks
- Each tool based on different language/approach
- Each user should follow the «trial and error» approach



Thank you!

Irene.Kitsara@wipo.int