

Product Description

Questel Supportive Proposal document nb 213

Adapted Proposal to be sent directly by local representative

ORBIT INTELLIGENCE

This supportive document to proposal was prepared on the basis of requirements described and represents the best technical and standard financial offer from Questel to meet these requirements. This document is strictly confidential and must not be disclosed to third parties, even partially, without the written approval of Questel, and even after the expiry of this proposal.

The supportive document to proposal and any prices quoted herein are valid as described in the proposal.



TABLE OF CONTENTS

Α.	EXECUTIVE SUMMARY	3
	QUESTEL	
٦	TEA IP Sdn Bhd	Error! Bookmark not defined.
5	Summary of the financial proposal	3
1	1. Payment Terms	Error! Bookmark not defined.
R	TECHNICAL PROPOSAL	Δ



A. EXECUTIVE SUMMARY

QUESTEL

Created in 1978, Questel is present in over 30 countries with offices in London, Paris, Bonn, Washington, Sao Paulo, Tokyo and Shanghai. More than 3000 companies worldwide and 100,000 users rely on our solutions to meet the challenges of intellectual property of their R&D, legal, financial and strategic departments.

Today Questel is represented by 150 employees all around the world. We occupy a leading position in the market of solutions dedicated to Industrial Property.

Questel offers a full range of web services dedicated to intellectual property. From idea to product, the offer covers the entire innovation life cycle:

- Patentability search, FTO
- Competitive Intelligence
- Ideation and invention disclosure
- Intellectual Asset Management
- IP Portfolio evaluation
- IP and business Consulting

Our extensive and unique collection of intellectual property databases can be analyzed, shared and archived. We support a large audience of users from inventors, IP specialists to business developers.

For each business process of the innovation lifecycle, we can propose relevant consulting services and e learning courses to widespread the importance of IP inside organizations.

SUMMARY OF QUESTEL OFFER FOR 2016/2017





B. TECHNICAL PROPOSAL

ORBIT INTELLIGENCE SUBSCRIPTION PLAN 2016-2017

Orbit	2016 SUBSCRIPTION PLANS				
IP Business Intelligence	BRONZE	SILVER	GOLD	PLATINUM	
ANALYSIS					
Analyze patent families instantaneously	x	$\sqrt{}$ Up to 100000 records per analysis	√ Up to 300 000 records per analysis	√ Up to 2000 000 records per analysis	
Save & archive patent analysis	x	√ Up to 15 000 records per analysis	√ Up to 20 000 records per analysis	√ Up to 30 000 records per analysis	
Analyze Workfiles, including custom fields	x	√ Up to 15 000 records per analysis	√ Up to 20 000 records per analysis	√ Up to 30 000 records per analysis	
US IP Litigations	X	٧	٧	√	
Create and name permanent or temporary data merging rules	X	٧	٧	√	
Scan through records from chart single selection	X	٧	٧	√	
Share html Presentation containing a selection of charts and comments	X	V	√	√	
Color charts by values, save color templates	X	X	V	√	
Scan through records from chart multiple selection	X	X	√	√	
Drill down from selections of chart values	X	X	√	√	
Create chart templates available for future analysis	x	x	√	√	
Analyze normalized technical concepts	X	x	√	√	
Customize axis of analysis with any complex strategies or lists	x	x	x	√	
Export complete set of analyzed data into Excel spreadsheet	X	X	X	√	

EVALUATION	ORBIT FOR				
INNOVATION	Technology Scouting	x	x	x	٧
INIOVATION	M&A Licensing-in	x	x	x	٧
RISK ASSESSMENT	Business Case Assessment	x	x	x	√
RISK ASSESSIMENT	Legal Risk Assessment	x	x	x	√
PORTFOLIO MANAGEMENT	Ability to Exclude	x	x	x	√
PORTFOLIO MANAGEMENT	Portfolio Pruning	x	x	x	٧
LICENSING	Licensable Art	x	x	x	√
LICENSING	Licensing-Out	х	x	x	٧



ORBIT PATENT SEARCH MODULE

The Orbit.com patent search module allows users to search, download, review, store and monitor patent information across one of the most comprehensive selection of databases available. Orbit offers advanced search capabilities combined with a focus on usability. The figure below shows the general search form, but it is also possible to search using command line.

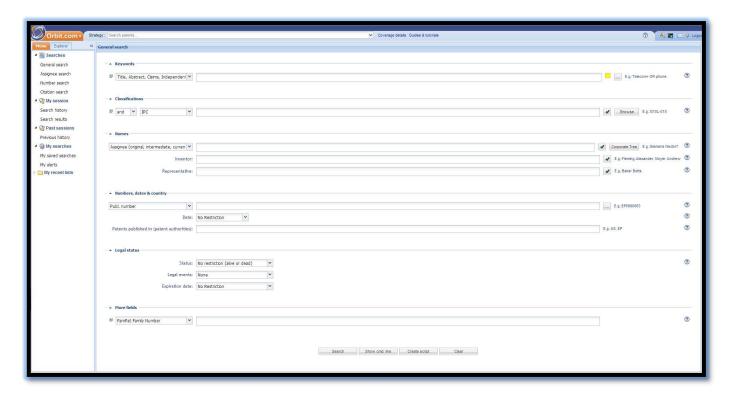


Figure 1 - Orbit General Search Assistant

Orbit.com patent search capabilities include:

- Text searching: title, abstract, full text, claims, descriptions, concepts, key content (independent claims, advantages and drawbacks patent object) may be searched together or separately
- Specialized searching by assignees including normalized patent assignee names, US reassignments and corporate tree
- Inventors, Dates, Countries and Citations
- A range of classification systems (IPC, CPC, ECLA, US, Japanese FI and F-Terms)
- Normalised legal status, including Estimated Expiration Date, status (granted, pending, revoked etc.) and state (dead, alive)
- Search using the multi-lingual assistant and linked relevant concepts wizard to enhance strategies using synonyms and their translations (English, French, German) and relevant standardized concepts
- Combination of the above criteria
- Combination of varied search strategies and search statements
- Citation search:
 - Citing / cited (forward / backward) dynamic report from a publication/application/priority number
 - o Citing / cited (forward / backward) dynamic report from an entire result set
 - O Dynamic and interactive graphical representation of citations by publication or by families with relevancy codes identification and filters (patents cited in categories X, Y, A, D etc.)



- Citation coverage includes EP, WO, US, AP, AU, AT, BE, BG, CH, CZ, DE, DK, EA, ES, FR, GB, GR, IT,
 JP, KR, LU, NL, SG and TR
- Similarity search:
 - Identify similar patents by retrieving those indexed with the same Concepts, classification codes as well as those citing the original patent.

DOWNLOAD PATENT COPIES

Patent documents can be downloaded from over 40 authorities. Users can download the patent copies one at a time or in batches. A limit of 10,000 patent copies per month is applied to each user ID.

A separate patent copy User ID can be set up for administrators who will mainly work with PDF downloading.

USER LISTS

The *list* function in Orbit allows users to store and organise patent information into folders and subfolders. The lists can be shared between users that have an Orbit.com patent search log-in. There is no limit to the number of documents that can be permanently stored in lists.

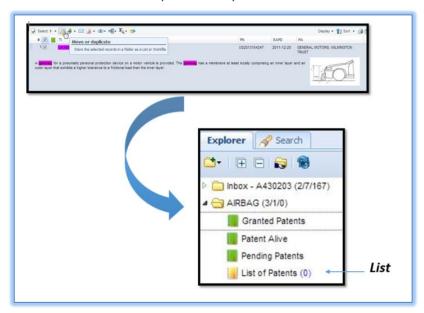


Figure 2 - Document Management via User Lists

ALERTS

For monitoring purposes alerts can be set up. They can be delivered as a PDF, rtf, xls, txt format, RSS feeds, or via permalink email. An email alert can be distributed (email forward) to any number of recipients.

Any possible search query – based on more than 100 available fields and parameters – can be used as basis for an automatic alert. Specific update codes allow to consider completely new patent families or/and new added documents to existing patent families, including machine translations or not etc.



LEGAL STATUS ALERTS (OPTIONAL)

The legal status watch module, can offer monitoring of changes in Inpadoc families and legal status together with changes in the following national registers: EP, DE, GB, US, CA, KR, FR, JP, CN

WORKFILE COLLABORATION PLATFORM

The Orbit.com data management system, also called Workfiles, allows users to store, organise, customise and share patent data, non-patent data, and industrial designs across the organisation. This tool can also be used to create an internal database of prior-art.

The Workfile system allows expert users to save information permanently in folders. Patent families stored in the workfile system can be annotated and indexed according to internal classification systems. Information can be searched inside each workfile, and across all workfiles available to the user.

Workfiles can be shared with other expert users and / or to a specific number of Readers. The Readers can search, display and browse the data in workfiles that have been shared with them, even if they do not have an Orbit search license of their own.

EXPERT VS. READER CAPABILITIES

The table below indicates the main differences between an Expert Orbit account and a reader account.

Table 1 - EXPERT vs. READER

	Reader	Expert
Search entire base (Patents and Designs)		•
Browse a specific folder and display content	•	•
Create and modify alerts		•
Receive alerts	•	•
Add/Delete document references to/from folders		•
Manage personalized user fields		•
Adding comments	•	•
Relevance ranking (enables faster sorting)	•	•

PATENT ANALYTICS MODULE

Orbit IP Business Intelligence is a powerful tool available at GOLD level for professional analytics and visualisations of patent data. The tool is completely integrated with the patent search tool, and benefits from speedy processing time, and flexibility in creating graphs and reports. The user can interact with the graphs, and access patent records directly from the graph.



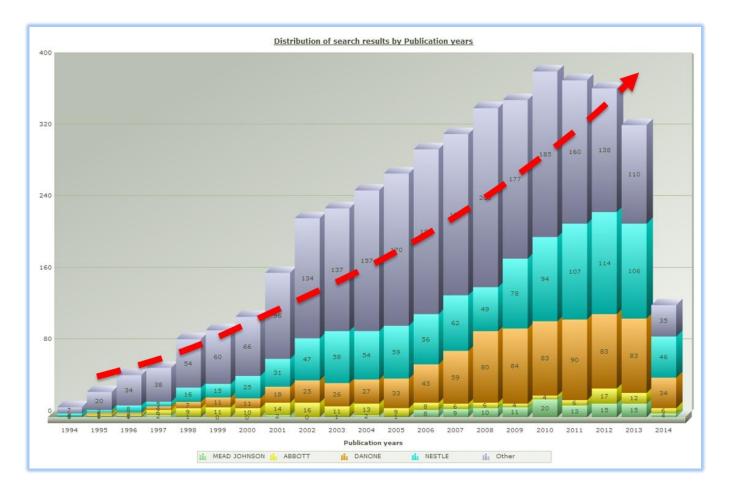


Figure 3 - IP Business Intelligence Report

Three levels for professional use can be offered – Silver, Gold and Platinum.

<u>Silver:</u> The Silver version of the IP Analytics tool has been developed with occasional users in mind. Silver is easy to use, and is very well integrated into Orbit. Data sets of up to 100,000 families can be analysed on a live analysis.

<u>Gold</u>: Gold meets the vast majority of needs for the professional user. Data sets of up to 300,000 families can be analyzed with this tool on a live analysis (20,000 on a saved analysis).

<u>Platinum:</u> The Platinum version is a premium tool, which offers additional flexibility through the dynamic custom axis functionality – this is helpful when conveniently categorising the information. It can handle data sets of up to 2,000,000 family documents on a live analysis. Platinum also includes a landscaping / mapping feature, with an interactive topographic style map. The Platinum subscription level also includes an IP Evaluation tool which facilitates the evaluation and benchmarking of patent portfolios (see below).

RESEARCH DISCLOSURE DATABASE (OPTIONAL)

We can offer access to search all disclosures from the Research Disclosure archive of defensive publications. Access through the following web site: www.researchdisclosure.com



ORBIT DATABASES

Orbit offers one of the most comprehensive collections for patent information and industrial designs. Coverage is drawn from more than 100 international and regional national offices. Questel databases are continuously updated and enhanced.

PATENT DATABASES

Questel offers access to three patent database collections:

<u>FamPat:</u> A global patent collection organized by patent families covering more than **100 patenting authorities**, and including searchable full-text from 23 patent offices. Questel has developed a family definition that combines the rule of strict family from EPO, combined with additional rules to consider different definitions of patent family.

<u>PlusPat:</u> A global patent collection of bibliographic data organized by patent office and covering more than 100 patenting authorities.

<u>Full-Text:</u> A collection of full-text from 23 patenting authorities, which can be searched individually or simultaneously.

See Table 2 below for an outline of the data coverage for Orbit's patent databases.



Table 2 – PATENT DATABASES

	Full Text	PlusPAT	FamPAT
Description	Full text patents in	Worldwide collection	Worldwide collection
	23 offices	organized by office	organized in families
Coverage	23 offices	More than 100 offices (6	More than 100 offices (6
	AU, BE, BR, CA, CN, DA, EP, FI,	regional).	regional).
	FR, DE, IN, IL, JP, KR, WO, RU,	33 offices for short term	33 offices for short term
	ES, SW, CH, TW, TH, UK, US	patents	patents
Original language	•	•	•
		Bibliography	
English Translation		•	•
		JP, CN, KR, TW	GB, US, WO, EP, FR, DE, JP, CN KR, TW
English Machine	•	•	•
translation			
Search result list	1 result per available	1 result with all documents	1 result per patent family
	document	from the same office	(invention)
Document download	•	•	•
Bibliography	•	•	•
Title, abstract, numbers,			
codes, names			
Claims	•		•
	WO, US, EP, AT, BE, BR, CA,		WO, US, EP, AT, BE, BR, CA,
	CH, CN, DE, ES, FR, GB, JP, RU,		CH, CN, DE, ES, FR, GB, JP, RU
	DK, FI, SE, IN, TW et KR		DK, FI, SE, IN, TW et KR
Description	•		•
	WO, US, EP, AT, BE, BR, CA,		WO, US, EP, AT, BE, BR, CA,
	CH, CN, DE, ES, FR, GB, JP, RU,		CH, CN, DE, ES, FR, GB, JP, RU
	DK, FI, SE, IN, TW et KR		DK, FI, SE, IN, TW et KR
KWIC	•	•	•
Legal status	•	• I I I I I	• 11 1 50
	Disponible pour plus de 50	Disponible pour plus de 50	Disponible pour plus de 50
Full Acus	pays	pays	pays
Full text	ANO LIC ED AT DE DD CA	WOLLS ED AT DE DD CA	• ANO LIC ED AT DE DD CA
	WO, US, EP, AT, BE, BR, CA,	WO, US, EP, AT, BE, BR, CA,	WO, US, EP, AT, BE, BR, CA,
	CH, CN, DE, ES, FR, GB, JP, RU,	CH, CN, DE, ES, FR, GB, JP,	CH, CN, DE, ES, FR, GB, JP, RU
Coords by code	DK, FI, SE, IN, TW et KR	RU, DK, FI, SE, IN, TW et KR	DK, FI, SE, IN, TW et KR
Search by code	CIB, US (P&A), FI et F-Terms	CIB, ICO, ECLA, US P&A, FI et F-Terms	CIB, ICO, ECLA, US P&A, FI et F
Key information		r-Terms	Terms
key illioilliation			WO, EP, US, GB
Concepts			WO, EF, O3, GB
Concepts			WO, EP, US, GB
Time line			WO, LF, 03, GB
Patent reports		•	•
i atciti i cporto		EP, WO, U.S, AP, AU, AT, BE,	EP, WO, U.S, AP, AU, AT, BE,
		BG, CH, CZ, DE, DK, EA, ES,	BG, CH, CZ, DE, DK, EA, ES, FR
		FR, GB, GR, IT, JP, KR, LU, NL,	GB, GR, IT, JP, KR, LU, NL, SG
		SG et TR	et TR



ORBIT EXPRESS



Why use Orbit Express?

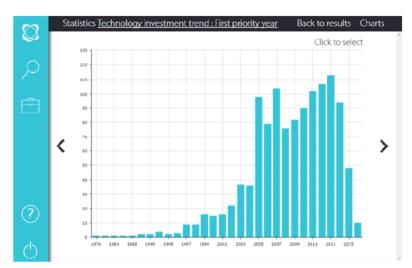
Simplified access to Questel well-known patent worldwide database

Collaborate with IP experts through Workfiles

All mobile device compatible

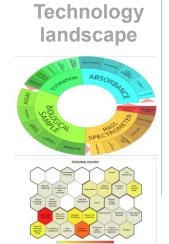
Graph usage to refine searches

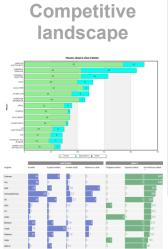
Questel hosting to preserve your search confidentiality

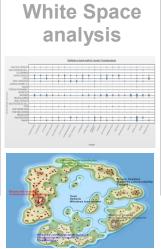


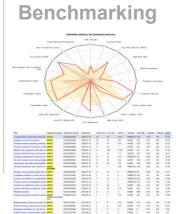
Orbit Express is a fast and intuitive patent search tool, with collaborative functionalities, efficiently connected to Orbit Intelligence

PLATINUM ANALYTICS AND EVALUATION MODULE









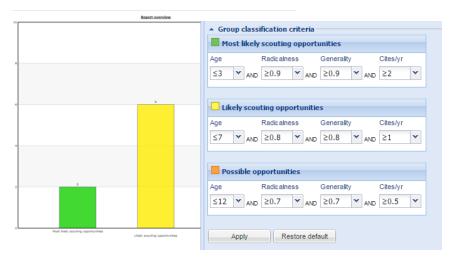
Evaluation and





Licensable Art

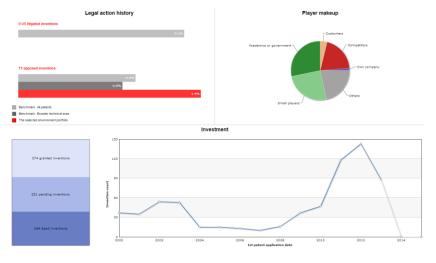
Gives various information especially on the most impactful player of the industry (The most forward citation), the profile of litigation etc...



Technology Scouting

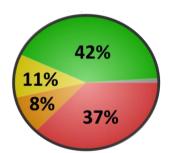
List the most disruptive technology from the selected list of patents.

In average, profile show that the most disruptive technology will have their backward citation with more classification. In opposite to incremental innovation



Legal Case Assessment

This dashboard is mostly used to understand the market maturity. It will highlight the composition of the market which percentage is own by University, small player and multinational as well as investment information and legal information.

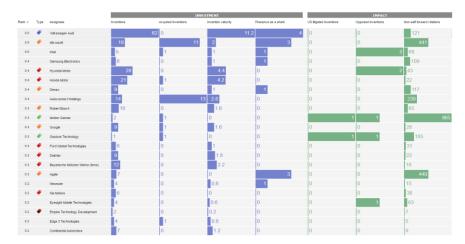




Prunning

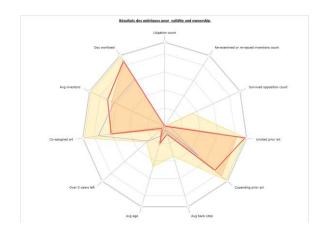
It will classify the selected patent into 4 value group from the most valuable to the least valuable. Very useful to filter the good patent from the





Business Case Assessment

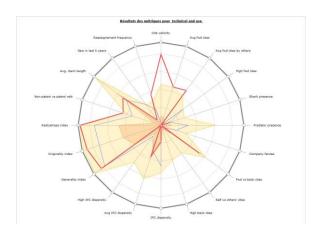
For each company selected, the dashboard will highlight the profile of the company in the specific sector studied. Highlight if the company has acquired the inventions or if it is done in house. Very useful to understand if they potentially buy technology or if they do everything in house and many more information

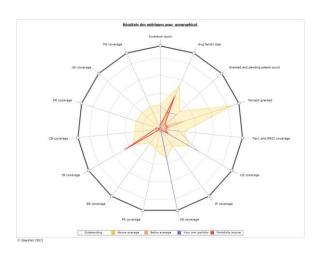


Licensing In/Out

Both licensing In and Out will generate the evaluation of the selected set of patent with more than 47 metrics including both market, legal and technology metrics. The result can be visualize under a spider graph or under an array of value with order done based on the most valuable patent.



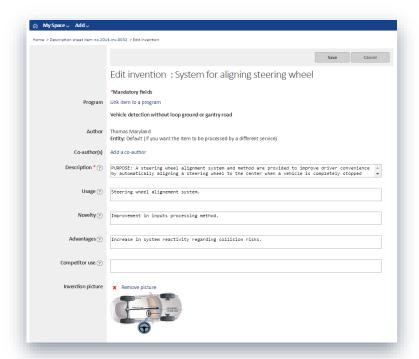




ORBIT IAM (INVENTION AND ASSET MANAGEMENT)

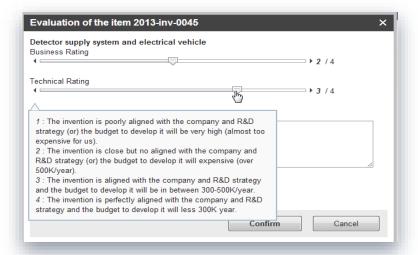
ORBIT INVENTION





1. Submit

Inventors are able to describe their inventions in a tailored invention disclosure form.



2. Assess

Technical experts and other stakeholders can be consulted for advice during the review process to give a score to the invention being review.

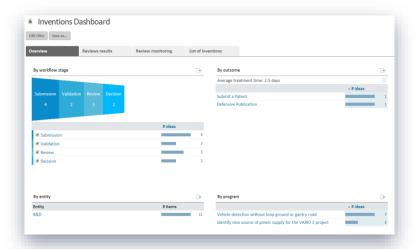


3. Decide

Reviews, ratings, and comments help the decision committee in forming their conclusion and providing a







4. Reporting

Dashboards provide stakeholders with an overview of the inventions status and most prolific inventors.

Novelty search within the platform

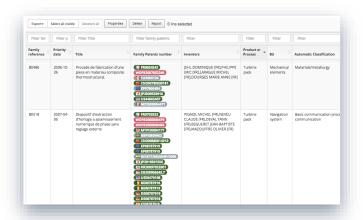
The particularity of this workflow is the ability to perform live prior art (Novelty search) on the submitted invention. Thus the review panel will know if the invention is novel or if there is similar patent in the world.

Novelty search within the organization

To avoid duplication of project submitted, an automatic similar search is done with the previous project submitted. Similar project will appears in a specific panel which will be available for the review committee.

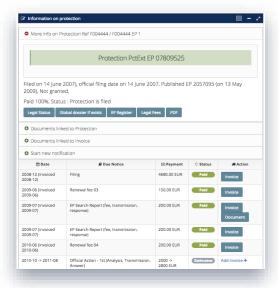
ORBIT ASSET





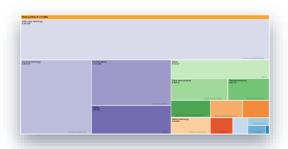
1. Organise

Associate you IP assets with your products or business units.



2. Monitor

Don't miss any payment related to the maintenance of your IP. Keep track of the all the task to be done.



3. Strategize

Get your grouping done under Orbit Intelligence and apply the financial forecast to understand the cost of each category.

E-TRAINING MODULE

Certification program done by a set of videos and quiz on the below topics. These videos are deliver by an American lawyer. Examples can be found here: https://www.eiptraining.com/deliverDirect.aspx?eID=58275





Executive Micro-Modules	Length
IP Micro-Modules	Promo Video & Description
IP Micro Module - Beware of Co-Ownership of IP	1:08
IP Micro Module - Beware of Copying from the Web	1:07
IP Micro Module - Beware of Patent Infringement	1:00
IP Micro Module - Beware of Patent Trolls	1:00
IP Micro Module - Can a Trademark Be a Scent?	1:06
IP Micro Module - Can a Trademark Be a Sound?	0:46
IP Micro Module - Cannot Make your Patented Product	0:55
IP Micro Module - Competitive Patents	1:02
IP Micro Module - Copyrights	0:50
IP Micro Module - Defensive Publishing for Competitive Advantage	1:03
IP Micro Module - Enforceability of Trade Secrets	0:48
IP Micro Module - Freedom to Operate Searching	0:57
IP Micro Module - How Expensive is a Patent?	0:33
IP Micro Module - IP Can Attract Venture Investments	1:06
IP Micro Module - IP Ownership with Contractors	1:03
IP Micro Module - IP Risks and Opportunities	0:23
IP Micro Module - NDAs Require Careful Review	0:43
IP Micro Module - Non-Disclosure-Agreements	1:20
IP Micro Module - Patent Inventorship	0:44
IP Micro Module - Patents are only Enforceable in Issuing Country	0:29
IP Micro Module - Patent versus Trade Secret Protection	1:03

Orbit Trademark

Search of trademark with similarity search and automatic translated search in the following countries :

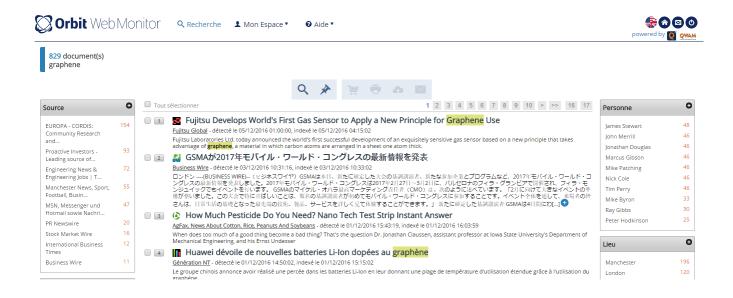




Orbit Web Monitor

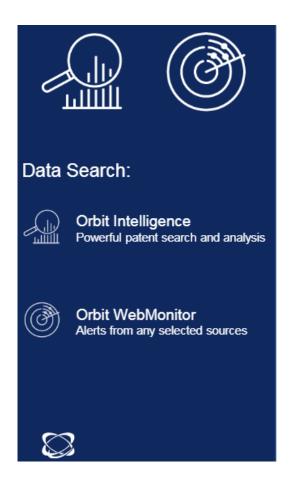
40,000 links by default, the tool allows to import your own links to watch.

You can then customize an alert query to receive on weekly basis the content targeted. It includes light analytics. This content can then be uploaded to Intellixir to cross reference with Patent information.



Intellixir





Merge data types within Intellixir

- Patents from most Data Providers
- Web business information from Orbit WebMonitor.
- · Scientific Articles from most Data Providers
- Can also include:
 - Clinical trials
 - GNPD
 - Designs
 - Trademarks
 - Excel (e.g. licensing data/pipeline data...)

Present results using the dashboard.

