IP Management, Licensing and Commercialisation

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Edinburgh (UK)



IP Management, Licensing and Commercialisation

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IP management, licensing and commercialisation is the work of treating patents, trademarks, copyright, designs and trade secrets as business assets: recording them, deciding which to keep, and earning value from them through use, licences and sale. This 1-week course is for professionals who look after an organisation's intellectual property, and each delegate builds an IP management plan for a case organisation. The subject is taught by Blackbird Training Centre.

Introduction

The course rests on three references. ISO 56005 gives guidance on tools and methods for managing intellectual property within innovation. ISO 10668 sets requirements for monetary brand valuation. The TRIPS Agreement, the World Trade Organization agreement on trade-related aspects of intellectual property rights, sets minimum standards of protection that its members apply. The level is practitioner. Teaching uses case studies of a medical device maker, a software company and a consumer brand, with delegates negotiating a licence in pairs.

Course Objectives

- Distinguish patents from trade secrets, and select the form of protection that suits a given invention.
- Apply an IP audit to identify, record and confirm ownership of an organisation's IP assets.
- Compare exclusive and non-exclusive licences, and justify the scope and royalty terms of a licence.
- Interpret freedom-to-operate and landscape results to decide whether to file, license in or design around.
- Select a valuation approach for an IP asset and interpret the result for a licensing or sale decision.

Target Audience

- IP officers and in-house legal advisers who must decide which assets to register, renew or abandon.
- Research, development and innovation managers who must judge when an invention should be patented or kept secret.
- Technology transfer and licensing staff who must choose licence structures for research results.
- Brand and marketing managers who must decide how trademark protection supports brand value.
- Finance and business development managers who must judge what an IP asset is worth in a deal.



Course Outline

Day 1: IP Rights as Business Assets

- Patents vs Trade Secrets: Disclosure for Protection Against Confidentiality Without Expiry
- Trademarks, Copyright and Designs: What Each Right Covers and How It Arises
- TRIPS Agreement and International Filing Routes: Patent Cooperation Treaty and International Trademark Registration
- IP Life Cycle: Creation, Protection, Use, Renewal and Abandonment Decisions
- ISO 56005: Guidance for Managing Intellectual Property Within Innovation

Day 2: IP Audits and Portfolio Management

- IP Audit: Identifying, Recording and Confirming Ownership of Organisational IP Assets
- Patent Search and Landscaping: Prior Art Searches and Freedom-to-Operate Analysis
- Filing Strategy: Where, When and Whether to Apply for Patent Protection
- Portfolio Pruning vs Portfolio Expansion: Renewal Decisions Weighed Against Cost and Value
- Employee and Contractor Inventions: Assignment Clauses and Ownership of Results

Day 3: Brands, Copyright and Confidential Information

- Trademark Clearance and Registration: Searches, Classes and Opposition Risk
- Copyright in Software and Digital Content: Ownership, Open Source Licences and Reuse
- Brand Value Creation: Linking Trademark Protection to Brand Equity
- Trade Secret Protection: Access Controls, Confidentiality Agreements and Internal Policies
- Open Innovation vs Secrecy: Sharing With Partners While Keeping Know-How Protected

Day 4: Licensing, Enforcement and Technology Transfer

- Exclusive vs Non-Exclusive Licences: Scope, Territory, Field of Use and Exclusivity
- Royalty Structures: Running Royalties, Lump Sums, Milestones and Minimum Payments
- Technology Transfer: Moving Research Results From Laboratory to Market Use
- Infringement Enforcement: Monitoring, Cease-and-Desist Letters, Litigation and Mediation
- Trade Secret Misappropriation: Evidence, Remedies and Departing Employee Risk

Day 5: IP Valuation and the IP Management Plan in Practice

- Cost vs Market vs Income Approach: Three Methods for Valuing IP Assets
- ISO 10668 Brand Valuation: Legal, Behavioural and Financial Analysis Requirements
- IP in Mergers and Acquisitions: Due Diligence of a Target Company's IP
- Licensing Term Sheet: Drafting the Key Terms for a Case Technology
- IP Management Plan: Audit Register, Portfolio Decisions, Licence Terms and Valuation Note



Skills You Will Gain

- IP audit and asset registers
- Freedom-to-operate analysis
- Patent filing strategy
- Trademark clearance
- Trade secret protection
- Licence structuring
- Royalty modelling
- IP valuation

Why Attend This Course

- From treating IP as a legal formality to managing it as a set of assets with costs and returns.
- From renewing every registration by default to pruning the portfolio by value and use.
- From signing licences on a counterparty's template to setting scope, territory and royalty terms with a reasoned position.
- From scattered IP records to an IP management plan with an audit register, portfolio decisions, licence terms and a valuation note.

Conclusion

In essence, the subject is turning legal rights over ideas, brands and know-how into managed assets that earn their keep. The course makes three distinctions clear: patents against trade secrets, exclusive against non-exclusive licences, and cost, market and income approaches to valuation. It suits IP officers, innovation managers and licensing staff who understand the main IP rights and now need to decide how those rights are kept, used and sold.

Course FAQs

What is IP management, licensing and commercialisation?

It is the management of patents, trademarks, copyright, designs and trade secrets as business assets: auditing and maintaining them, deciding which to protect, and earning revenue through use, licences, sale or technology transfer.

What is the difference between an exclusive and a non-exclusive licence in IP licensing?

An exclusive licence gives one licensee the right to use the IP in a defined field and territory, excluding others and often the owner. A non-exclusive licence lets the owner license the same IP to several parties, usually for lower royalties.



Which standards does the IP management, licensing and commercialisation course follow?

It follows ISO 56005 for managing intellectual property within innovation, ISO 10668 for brand valuation, and the TRIPS Agreement for the minimum standards of IP protection.

Is the IP management, licensing and commercialisation course right for a technology transfer officer?

Yes. A technology transfer officer works through invention disclosure, filing decisions, licence structures and royalty terms, and finishes with a term sheet for a case technology.

What does a delegate produce in the IP management, licensing and commercialisation course?

Each delegate produces an IP management plan for a case organisation, containing an IP audit register, portfolio decisions, a licensing term sheet and a valuation note.

