IP analysis – more than just patent counting

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What characterizes an IP analysis?

In the field of patents, the question often arises "How does our patent situation compare with our competitors?"

This is where IP analyses come in.

Fully automated IP analyses, which can be generated using standard software tools, provide a large number of data points and diagrams quickly and cost-effectively. However, the disadvantages are the lack of traceability of the analysis and the lack of company-specific relevant statements.

IP analyses are used for two main use cases: Competitor analyses ("benchmarking") and patent landscaping (also known as "white-spot analyses").

Methodology

The first step in evaluating an IP analysis is to conduct a search and thus narrow down the subject of the analysis in terms of patent applicants, technologies, countries, and time period.

Well-founded patent search experience is required to identify a relevant and as complete as possible basic set of IP rights from the more than 100 million patent documents. This basic set can then be analyzed with regard to various

aspects. Patent databases contain a large number of patent publications that should be cleaned up before being analyzed. These include, for example, examination notices, translations, or several publications to a patent application.

Different spellings of applicant names sometimes have to be taken into account during data preparation. When analyzing the filing activities of large international corporations, it should be noted that the patents could also be filed by more or less independently operating subsidiaries. In addition, there are country-specific particularities, for example, it is quite common for US companies to register property rights not in the name of the company, but only in the name of the main developer or managing director.

Patent Landscaping

As part of patent landscaping, the patent landscape is broken down into specific technological issues or technology areas. This allows so-called "white spots" – i.e. topics with low application activity or new technology approaches - to be identified, which can serve as a basis for strategic decisions in the context of product development or IP strategy.

Evaluation and processing of the analysis

The distinction between individual patent applications and patent families is central to IP analyses. Analyzing on a patent family basis allows statements to be made about the number of inventions of an applicant. The analysis on the basis of patent applications allows statements to be made about country-specific application activities. It is essential to consider only one publication

per patent family and country in order to avoid distortions, e.g. from country-specific examination procedures.

Typical analyses include:

- Filing trends
- Patent strategies (technology distribution, geographical distribution)
- Ranking of top inventors
- Comparison of filing activities (filing strategy) and active patent portfolio (active IP rights)
- Focus on specific regions of the world (China / North America / EU)

It is important to document and store search queries and raw data in order to be able to answer queries from the recipients of the results in a reproducible manner. They often request a "deep dive" in order to shed more light on individual aspects of the analysis.
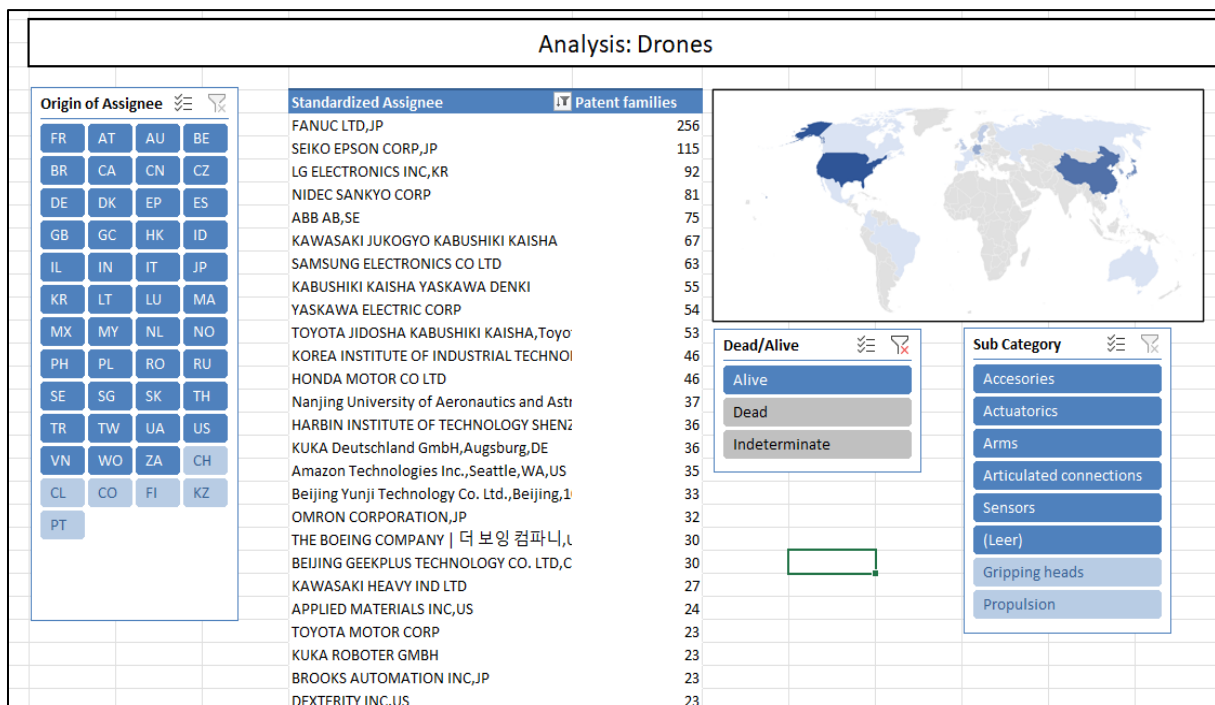

Exemplary data analysis

Patent Quality Index

When evaluating patent portfolios, it is not only their (numerical) size or age that counts, but above all their impact on the direct market environment. The Serviva Patent Quality Index takes into account the number of third-party citations of an active patent application – weighted by age and country of application. This allows patent portfolios to be benchmarked against competitors and therefore also provides information on the relative value of the portfolio.

Presentation of results

The presentation of the results of IP analyses poses particular challenges. They must be quickly comprehensible and unambiguous, provide clear statements and explain the methodology used. Finally, the presentation must not only fulfil the requirements of patent experts, but must also be understandable for non-patent experts and decision-makers in the company.
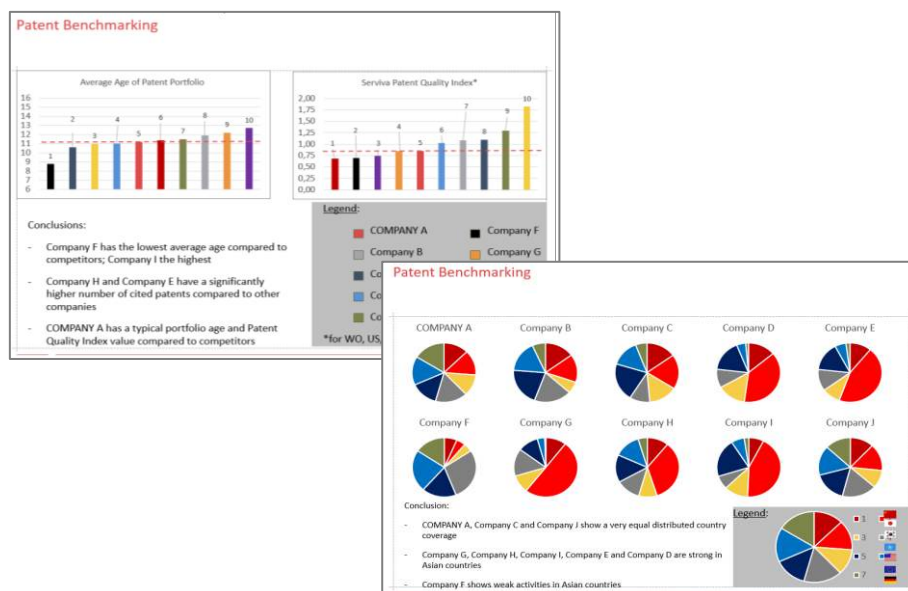
Presentation of results in PowerPoint slides

Limitations of IP analyses

IP analyses must always be considered in relation to the reporting date. This means, among other things, that unpublished patent applications from the 18 months prior to the analysis cannot be taken into account and are therefore structurally underrepresented.

The absolute numbers of patent families, patent applications or other data points can only provide an indication of a company's innovation activity. IP analyses do not provide any information about the extent of protection of property rights of the property rights under consideration.

Summary

IP analyses are used to analyze and present the patent landscape of an industry or company. They also provide analyses and statements on current technology and market trends. The basis for this is the evaluation of large amounts of patent data.

In addition to the statistical/quantitative evaluation, a qualitative evaluation – for example on the basis of the Serviva Patent Quality Index – can also be helpful in deriving statements from IP analyses.

IP analyses can provide a basis for strategic decisions in companies by providing explanations for developments in IP activities and providing well-founded answers to specific questions.

The most important results are summarized in a compact way so that they provide real added value even for managers without relevant IP knowledge.

The strength of the IP analyses offered by SERVIVA lies in the fact that reproducible answers to individual and specific questions are provided at all times on the basis of sound data provided and analyzed by experienced researchers.