IP RESEARCH
FOR BUSINESS EDUCATION

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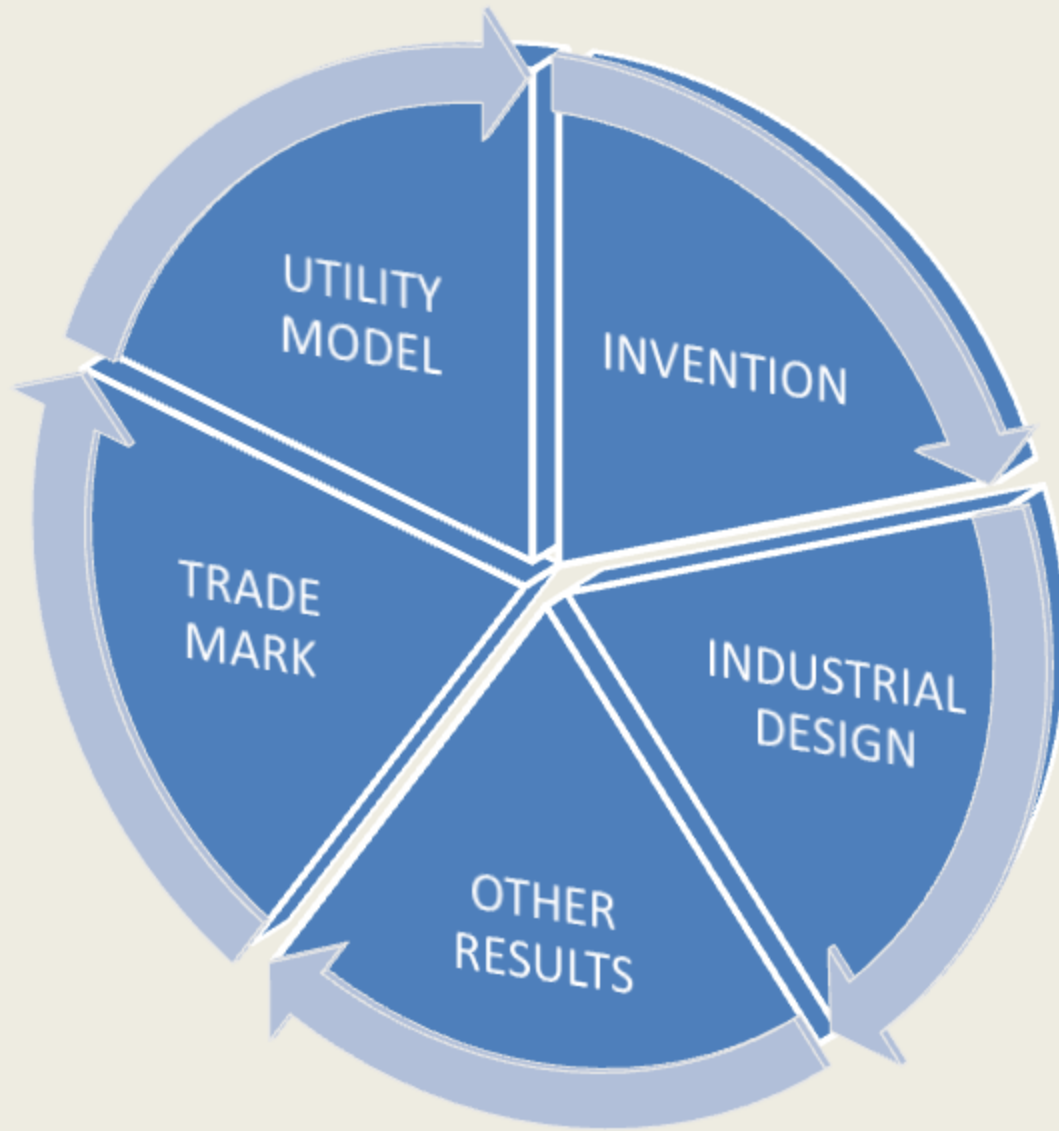CI and IP DEPARTMENT, UNWE

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As we know the IP system includes patents, utility models /UM/, industrial designs /ID/, trade marks /TM/ and others results of human intellectual efforts.

Abbreviations:

IP – intellectual property; IPR – IP rights

I–invention, P–patent;

ID–industrial design, TM–trade mark

IP SYSTEM

IP research is a research of the main objects of IP regarding the business implementation as follows:

1. Product and technological innovation;

2. Business indicators.

Research
for
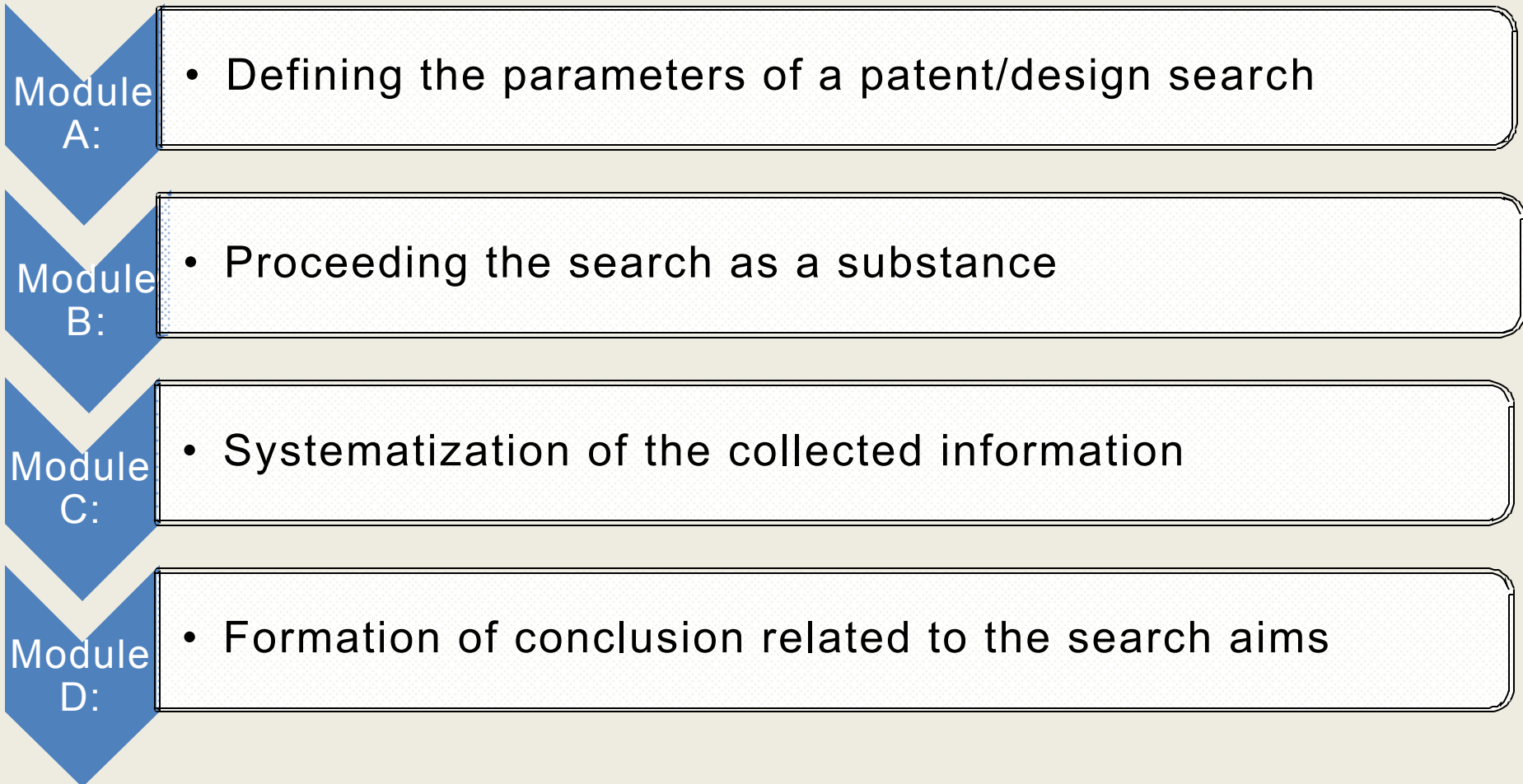# product and
technological innovation

IP rights on product and technological innovations that are new and industrially applicable, could be obtained in the following main legal ways:

A/ patent for invention;

B/ certificate for utility models;

C/ certificate for industrial designs.

Principle method for patent, UM or ID search includes the following steps:

Module A:
- Defining the parameters of a patent/design search

Module B:
- Proceeding the search as a substance

Module C:
- Systematization of the collected information

Module D:
- Formation of conclusion related to the search aims

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Module A:

Define the parameters of a patent/design search

1. **objectives of the study** – trends of the specific product and/or technological field; options for patentability of the specific new decision of product or technology; patent/design purity – specific legal term of non infringement of other's patent rights;

2. **the range of countries** – territory of BG, EC, others relating the market business aims;

3. **the depth of search** – examples: in research of trend the common depth is around 20- 25 years; in research of patentability – the period for research starts with the first application or issued IP documents;

4. **the way of search of DB** of patent/design documentation.

We differ 5 types of search

A. search based on IP classifications in the innovations field – International patent classification /IPC/ or European classification /ECLA/ for patents and UM, Locarno classification for ID.

For patents and UM search through ECLA index of interested product of technology field identify the classification index according to the ECLA:

- A – human necessities;
- B – performing operation, transportations;
- C – chemistry, metallurgy;
- D – textile, paper;
- E – fixed constructions;
- F – mechanical engineering, lighting, heating, weapons, engines, e
- G - physics;
- H – electricity;
- Y - general tagging of new technological developments.

ID search

For ID generally we may use the following Locarno indexes - 32 classes as whole in classification index according to the Locarno classification of ID – as examples in general:

- 06 – furniture;
- 09 - packages;
- 12 – transport means;
- 14 – communication equipment;
- 32 – graphic symbols, logos;

B. search through the name of the product or the technology

Generally – search in the terms like 'cars', 'engine', 'toys', 'jewelery'

C. search through the name of the company or natural person

Generally we use the name of the subject - owner of the patent/ UM/ ID

# D. search through the name of natural person – creator

Generally we may use the name of an inventor of the patent/ UM or the name of a designer of ID

E. search the specified patent, UM or ID number

Generally we may use:

- the number of patent like BG1762 – 'PORTABLE ELECTRONIC DEVICE FOR MEASURING FLAT RADIUSES AND INDICATORS'

- ID number like 002920074-0001- Tubes [for fluid distribution]
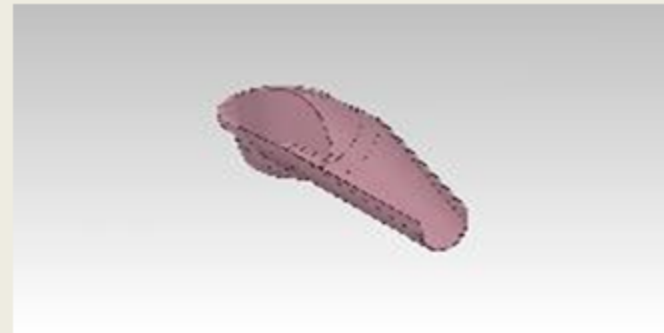
Module B:
proceeding the search as a substance

All types of patent search start with:

1-st step
- open the window 'patent search' on the web site of EPO/ OAMI and put the identified index;

2-nd step
- put the identified index, name or number in the specific place

3-th step
- proceeding the search on the DB of millions patents

4-th step
- systemize the displayed on the screen results following the defined earlier aims

The main digitally based information sources for this search are the following web sites

- www.epo.org - for patented and applied inventions; for registered UM;
- www.oami.europa.eu - for protected ID on the territory of EC;
- www.wipo.int/hague - for protected ID on the territory of 67 countries-members of Hague agreement;
- www.bpo.org - for patented and applied inventions; for registered UM, ID or TM on the territory of Bulgaria;
- www.tmdn.com - data bases for more than 46 countries all over the world.

Advanced Search

1. Database

- Select the patent database in which you wish to search: Tooltip
- Worldwide - full collection of published patent applications from 90+ countries

2. Search terms

Enter keywords in English

- Publication number: WO2008014520
- DE19971031696 : Tooltip
- Application number WO1995US15925
- Priority number:
- Publication date:
- Applicant(s): Institute Pasteur
- Inventor(s): Smith
- European Classification (ECLA): F03G7/10
- IPC H03M1/12

Trade marks

Add search criteria from below:
- Trade mark information
- Trade mark representation
- Trade mark number
- Trade mark name
- Trade mark type
- Trade mark basis
- Trade mark description
- Trade mark status (CTM)
- Trade mark classification
- Owner ID number, Owner name
- Representative ID number, Representative name

RCD

Add search criteria:

- Design number
- Verbal element
- Designer number
- Designer name
- Design status
- Reference
- Record number
- Classification – Locarno cl.
- Indication of the product
- Owners and Representatives
      Owner ID number,   Owner name, Owner country
      Representative ID number,   Representative name

Module C:
Systematization of the collected information

Generally, the systematization of the collected information depends on the aims of the search.

The systematization should pay attention and be specialized as follows:

- for different countries;

- for each country and different companies;

- for different companies and/or the names of the inventors;

- for a chosen beforehand product and technology fields

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Module D:

Formation of conclusion

related to the search aims

We can make conclusions about:

- opportunities for protection of product/ technology decisions as a patent, UM and/or ID;

- trends in specific product/technology field;

- implemented strategies of Bulgarian and foreign companies for protection of their own product or technology;

- acting license agreements on a protected product or technology;

- business intention as an aim for a future cooperation in the product/ technology field

Research
for
business indicators

IP rights on business indicators /BI/ could be obtained in the following main ways:

A/ as trade marks;

B/ as industrial designs

Note: BI are all of the company signs, products, communicative means and others, that can be used in the strategy of the company style for a purpose of corporate identity

All types of patent search start with:

Module A
- Defining the parameters of the search

Module B
- Proceeding the search

Module C
- Systematization of collected information

Module D
- Formation of conclusion related to the search aims

Module A:

Defining the parameters of the search

- the objectives of the study – legal option for registration of TM and/or ID TM/ ID purity – specific legal term of non infringement of other's TM or ID rights, others;

- the range of countries – BG, EC, others;

- the depth of search – examples: in research of trend the common depth is around 20- 25 years;

- the way of search of DB of TM/ID documentation.

We differ 3 main types of search

- search through the classification index of interested TM/ID /like "package': class 6 – for TM; classes 5, 9 for ID/;

- search through the name of the company or natural person – subject - owner of the TM/ID;

- search through the name or N of the representative of the company or natural person

Module B: proceeding the search

All types of TM/ID search start with:

1st step:
- open the window 'TM name' on the web site of OAMI/WIPO;

2nd step:
- put the identified index, name or number in the specific place;

3rd step:
- proceeding the search on the DB of millions TM/ID.

The main digitally based sources for this search are the following web sites:

- www.oami.europa.eu - for protected TM/ID for EC territory
- www.wipo.int/hague - for protected TM/ID on the territory of 167 countries-members of WIPO/ Madrid or Hague agreements, Madrid Protocol;
- www.bpo.org - for patented and applied inventions; for registered UM, for protected ID on the territory of Bulgaria;
- www.tmdn.com - data bases for more than 46 countries all over the world

Advanced search

Find term

- Designated territories;
- Select one or more designated territories ;
- Trade mark offices;
- Trade mark name e.g. COLA, COCA-COLA, FRESH, etc.;
- Application /registration number;
- Trade mark type;
- Trade mark status;
- Applicant name   e.g. JOHN*, *JOHN*, *JOHN etc.;
- Nice class   e.g. 12,13; 12..15; 1,14,20 etc.;

World Intellectual Property Organization

IP Services – PCT, Madrid, Hague

We differ 3 types of search:

- A. search through the classification index of the TM and/or ID we are interested in;

- B. search through the name of the company or the natural person – subject - owner of the TM/ ID;

- C. search for the specified TM or ID number

Module C:
Systematization of the collected information

Systematization of collected information/ DB:

- for different types of TM/ID – word, figurative and combined;

- for different classes and/ or countries;

- for each country and different companies;

- for different companies and/or classes;

Module D:
Formation of conclusions

- opportunities for protection of signs, logos, company names or others as TM and/or ID;

- legal options for protection of specific sign, logo, others;

- implemented strategies of Bulgarian and foreign companies for protection of their own product or technology excellence;

- acting license agreements for TM/ID;

- business intention /an aim/ for future cooperation in the field of TM/ID

Final words:

The relationship between the IP search and the management aspects of the company's IP as a business resource in two directions - 'innovations' and 'business indicators', is the source to form a well-based IP strategy including many aspects: innovations, corporate style, license and so on.

THANK YOU

FOR

YOUR ATTENTION

AND

DISPLAYED INTEREST!

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