



Presented by  
Management Forum

# Mastering Risk Management in the Patent Landscape - Freedom to Operate (FTO)

21 June 2024

+ 25 October 2024, 31 January 2025

Get to grips with the fundamentals of patent risk analysis, understand the scope of a FTO search and the associated challenges.



**Format:**  
Live online



**CPD:**  
6 hours for your records



Certificate of  
completion

# Course overview

## Are you navigating the complex landscape of patent risk analysis and mitigation?

This comprehensive one-day course guides participants through the intricacies of patent risk analysis and mitigation, with a specific focus on Freedom to Operate (FTO) studies. The trainers elucidate the decision-making challenges associated with FTO studies by offering insights into when and how FTOs can be instrumental in analysing and mitigating patent risks.

The course covers assessing risk and recognising the need of conducting an FTO, to the step-by-step process of conducting an FTO, analysing the results of an FTO, assessing the risks associated with the results of an FTO, and defining the most effective risk mitigation strategies.

Leveraging their extensive knowledge and industry experience, the expert trainers share practical tips and strategies, empowering attendees to utilise FTOs as efficient tools for risk mitigation.

The course will focus on:

- Choosing the optimal timing for conducting a risk assessment
- Identifying data points to determine if an FTO is the appropriate risk analysis tool
- Maximising safety by meaningfully assessing the risks associated to the results of an FTO
- Exploring pros and cons of IP risk registers
- Discussing possible risk mitigation strategies
- Effectively managing the risk raising from Non-Practicing Entities (NPEs) using an FTO

## Benefits of attending

By attending this comprehensive one-day event you will:

- **Gain** insights on decision making around the efficaciousness of FTOs
- **Understand** patent infringement risks in various jurisdictions
- **Learn** ways of recording and organising FTO results for efficient decision-making
- **Obtain** practical tips on patent risk mitigation
- **Hear** how an FTO can be a strategic tool against NPEs
- **Work** on a practical case and discuss the results with peers

During the course the expert trainers will propose a hands-on risk assessment prior and post an FTO. In particular, they will show their own decision-making flow-chart to assess if the investment in an FTO is justifiable or not, and a scorecard that enables ranking the results of an FTO search to prioritise efforts in the FTO analysis.

There will also be time during the day to ask your questions to the expert trainers.

## Who should attend?

- IP lawyers and patent attorneys
- Heads of IP/Chief IP counsels
- Patent managers/agents/engineers/researchers/trainees
- IP risk and litigation managers
- Patent analysts, R&D scientists and engineers

This course is also relevant to customer service and training representatives in the commercial information provider community who want to know more about what their customers do with patent data and for all those wanting to consolidate and enhance their skills in searching.

# Programme

## Introduction

### Risk assessment

- Why?
  - Example of patent infringement
- When?
  - Waterfall model
  - Agile model
  - Product lifecycle

### Risk assessment prior to an FTO: Part 1

- FTO decision-making flowchart
- Working example: introduction

### Risk assessment prior to an FTO: Part 2

- Working example: discussion of results

### Freedom to operate: Part 1

- What an FTO is not
  - Differences against other types of searches
- Step-by-step process
  - Insourcing vs. outsourcing
  - FTO search
  - Search tools and their differences

### Freedom to operate: Part 2

- FTO analysis
- Claims interpretation
- Types of infringement
- Claim charting

## Risk assessment post an FTO

- Third party aggressiveness scorecard
- Working example: discussion of results

## Risk recordal and reporting

- Differences amongst various jurisdictions
  - China
  - Europe
  - USA
  - Other countries/regions
- IP risk registers
  - Pros and cons

## Countermeasures

- Design-around
- Observations
- Opposition
- Invalidation
- License-in
- Cross-licensing
- Acquisition
- Insurance

# Programme

## Preparing for NPEs

- Analyse-React-Defend

## Conclusions

- Key takeaways

# Presenters



**Simone Frattasi**

**Simone Frattasi** is a European Patent Attorney and a Telecom Engineer with a Diploma in IP Business Administration from CEIPI/University of Strasbourg and a PhD in Wireless, Mobile Communications. He is currently serving as the Head of Global IP at MAERSK, which, under his lead, won the Gold Award for 'Best IP Department Nordics' by Leaders League in 2022 and 2023. Prior to this role, he was the Head of the Patent Department at Sony Mobile Communications in Sweden. His expertise also includes working as a Patent Attorney at two Danish IP consultancy firms. In addition to his professional achievements, Simone has been an entrepreneur, having co-founded and served as CTO and COO for two start-up companies. Notably, he has represented Sweden in the ISO standard 'Innovation Management System, Guidelines for IP Management'. Moreover, he is the main author of the book: '[Patent Portfolio Management: A Practical Guide](#)' (Edward Elgar Publishing, 2023). He received the recognitions as Finance Monthly's IP Adviser of 2023 in Denmark, Managing IP's Top Twelve Europe's In-House IP Leaders of 2023, and Managing IP's Corporate IP Star in 2022 and 2023.



**Dipan Banerjee**

**Dipan Banerjee** is an Indian Patent Attorney and an Electronics Engineer. He is currently serving as a Patent Attorney at MAERSK, which won the Gold Award for 'Best IP Department Nordics' by Leaders League in 2022 and 2023. Prior to this role, he was working as an IP Professional at Hewlett Packard Enterprise. He has also worked at law firms advising many multi-national corporations on matters related to Intellectual Property (IP) creation, enforcement, and management. In addition to his professional achievements, Dipan has been involved in delivering guest lectures at several Indian Universities, including his alma mater Indian Institute of Technology (IIT), Kharagpur, on topics related to IP and technology.

# Course dates

**21 June 2024**

**Live online**

09:00-17:30 **UK (London)** (UTC+01)

Course code 14413

GBP ~~499 599~~

EUR ~~719 859~~

USD ~~823 979~~

**Until 28 May**

**25 October 2024**

**Live online**

09:00-17:30 **UK (London)** (UTC+01)

Course code 14414

GBP ~~499 599~~

EUR ~~719 859~~

USD ~~823 979~~

**Until 20 Sep**

**31 January 2025**

**Live online**

09:00-17:30 **UK (London)** (UTC+00)

Course code 14415

GBP ~~499 599~~

EUR ~~719 859~~

USD ~~823 979~~

**Until 27 Dec**

## How to book



**Online:**

[ipi.academy/2856](https://ipi.academy/2856)

Alternatively contact us to book, or if you have any queries:



**Email:**

[info@ipi.academy](mailto:info@ipi.academy)



**Phone:**

[+44 \(0\)20 7749 4749](tel:+442077494749)

## Discounts

- Booking more than one delegate on any one date qualifies for a **15% discount** on the second and subsequent places.
- Most events qualify for an **early booking discount** prior to 6 weeks before the course date. Be sure to check on our website, where the latest discounts will be shown.

## Further information

### Fee

The fee includes all meals and refreshments for the duration of the course (for venue-based courses) and a complete set of course materials (provided electronically). If you have any particular requirements, please advise customer services when booking.

### Please note

IPI Academy (and our training partners) reserve the right to change the content and timing of the programme, the speakers, the date and venue due to reasons beyond their control. In the unlikely event that the course is cancelled, we will refund the registration fee and disclaim any further liability.

### Terms and conditions

The rest of our terms, the event cancellation policy and the terms and conditions are on our website, please visit [ipi.academy/content/terms-and-conditions](https://ipi.academy/content/terms-and-conditions)

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For your FREE consultation and to find out more about how we can work with you to solve your training needs, please contact our training advisers:



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