

# CIP FORUM

BERKELEY 2020  
DEC 7-11



# A BRAVE NEW WORLD

## CIP FORUM 2020

**Theme: A BRAVE NEW WORLD**

**Chairpersons: Dan McCurdy and Suzanne Harrison**

**Location: Berkeley, CA (Dec. 7-11, 2020)**

**Website: <https://cipforum.org>**

### Overview

The CIP FORUM is CIP's flagship event where partners, colleagues, alumni, invited guests, and policymakers gather to address the key industry, university, and policy challenges of the transformation to a knowledge economy. The event has been held on eight occasions since 2001. In 2020, the event will take place in Berkeley to celebrate the 20-year anniversary of CIP and mark our new collaboration with UC-Berkeley. The focus of the event is on sharing innovative ideas, research, and practical experiences among global actors. A blend of theory and practice is employed to bridge the gap between strategy and policy and encourage critical reflection in a world where business and public policy are both in transition. The inclusion of local graduate students from CIP academic partners in the event allows the next generation to voice their opinions through the unfiltered lens of the beginner's mind. A key goal of CIP FORUM is to transform the dialogue into action through new initiatives together with industry partners, academia, and policy makers that will be carried out and presented in the next event.

CIP FORUM 2020 is the 20<sup>th</sup> anniversary of the founding of CIP, so the theme of "A Brave New World" was chosen to focus on the IP consequences of the technical, economic, and geopolitical developments over the last 20 years and the predictions for the next 20 years (20/20 vision if you will). This 20-year milestone offers a unique opportunity to critically reflect on how far we have come and where we are heading using a broader time horizon. The event will build on the main themes of transformation initiated in 2018 and expanded over five days as follows:

**1. Diversification (Societal Transformation)**

A focus on the state of development towards diversity and equality in the fields of IP, innovation, and entrepreneurship

**2. Digitalization (Digital Transformation)**

A focus on the changing role of market collaboration and competition in an era of digital transformation

**3. Globalization (Global Transformation)**

A focus on the increased geographical collaboration and competition in an era of global transformation

**4. Institutionalization (IP System Transformation)**



A focus on the IP system as a core institution and its impact on innovation in an era of global, digital transformation

**5. Professionalization (Professional Transformation)**

A focus on the development of the IP profession in an era of global, digital transformation

**Program**

The program is currently designed as a virtual event with a mix of plenaries and virtual workshops and roundtables, including specific sessions organized around subjects of current and future education, research, and collaboration projects by CIP and CIP Partners. Below is a draft schedule of activities, though the virtual delivery of the event provides flexibility to adjust certain timeframes. The timing of the event is centered around the Pacific Standard Time with the sessions held in the mornings and ending at 12:00 noon.

Monday, Dec. 7th	Tuesday, Dec. 8th	Wednesday, Dec. 9th	Thursday, Dec. 10th	Friday, Dec. 11th
Keynote	Keynote	Keynote	Keynote	Keynote
Plenary	Plenary	Plenary	Plenary	Plenary
Workshops	Workshops	Workshops	Workshops	Workshops



## **DAY 1 – Diversification**

### **Monday, December 7<sup>th</sup>**

#### **Conference Opening**

##### **08:30-08:45 CIP Welcome – Transforming Knowledge into Wealth and Welfare**

- Stephany Prince, Executive Director, Fung Institute of Engineering Leadership, UC-Berkeley
- Lee Fleming, Professor and Faculty Director, Fung Institute of Engineering Leadership, UC-Berkeley
- Bowman Heiden, Co-Director, CIP; Visiting Professor, UC-Berkeley

##### **08:45-09:00 Chairpersons Introduction**

- Suzanne Harrison, Principal, Percipience
- Dan McCurdy, CEO, RPX

#### **Plenary Sessions**

##### **09:00-09:30 Diversification Keynote**

Allen Lo, Vice President and Deputy General Counsel, Product, IP, and Legal Operations, Facebook

##### **09:30-10:30 Diversification Panel**

**Moderator:** Ray Millien, CIPO, Volvo Cars

**Panelists:**

- Ty Lord, Partner, Kilpatrick Townsend & Stockton
- Jeremiah Chan, Director and Associate General Counsel at Facebook; Patent Public Advisory Committee Member, USPTO; DEI Advocate
- Sandra Nowak, Assistant Chief IP Counsel, 3M
- Rachel Adams, Vice President, Deputy General Counsel, IDG/PCSD General Counsel, Lenovo

##### **10:30-10:45 Coffee Break**

#### **Workshop Sessions (10:45-12:00)**

##### **1. Applying Data/Metrics to Measure Diversity in IP**

**Description:** Gender diversity in patenting is a noble goal, however until a company can access its own portfolio gender data, it is not possible to even begin. This workshop will discuss some of the issues companies have been experiencing along



with easy and inexpensive options for getting their own gender portfolio data. In addition, we will also discuss some early portfolio metrics and frameworks.

**Chairs/Discussants:**

- Suzanne Harrison, Principal, Percipience
- Erik Oliver, COO at Richardson Oliver Insights / Partner at ROL Group

**2. Diversifying IP Education for National Competitiveness – Who, What, and How?**

**Description:** Intellectual property education has traditionally been taught as a specialty area of the law. However, as national competitiveness in the knowledge economy relies heavily on the creation, management, and commercialization of IP, the knowledge of IP in society across multiple actors must also increase. This session will take a critical look at the need to diversify IP education, including who needs to know about IP, what they need to know, and how it should be taught based on a broad set of educational experiences.

**Chairpersons:**

- Paul Michel, fm Chief Judge, CAFC
- Bowman Heiden, Co-Director, CIP

**Discussants:**

- Jelani Odlum-Lansiquot, Program Manager, The Michelson 20MM Foundation
- Dave Kappos, Partner, Cravath, Swaine & Moore
- Bruce Berman, CEO, Brody Berman Associates; Chairman, the Center for Intellectual Property Understanding
- Demi Ibrahim, Medical Device Research Intern, RPX Corporation



## **DAY 2 – Digitalization**

### **Tuesday, December 8<sup>th</sup>**

#### **Plenary Sessions**

##### **09:00-09:30 Big Tech and the Digital Economy Keynote**

- David Teece, Professor, UC-Berkeley; Chairman and Principal Executive Officer at Berkeley Research Group
- Nicolas Petit, Professor, EUI

##### **09:30-10:30 Big Tech and the Digital Economy Panel**

###### **Moderator:**

- Nicolas Petit, Professor, EUI

###### **Panelists:**

- Hal Varian, Chief Economist, Google
- Rima Alaily, Deputy General Counsel -- Competition Law Group, Microsoft
- Kirti Gupta, Vice President, Technology & Economic Strategy, Qualcomm
- David Teece, Professor, UC-Berkeley; Chairman and Principal Executive Officer at Berkeley Research Group

##### **10:30-10:45 Coffee Break**

#### **Workshop Sessions (10:45-12:00)**

##### **1. Blockchain - From Innovation to Institution**

**Description:** Blockchain is one of the most hyped innovations in recent history. This session will discuss (1) how blockchain may (or may not) disrupt/complement current institutions such as contracts and currency and (2) how blockchain is becoming its own institution impacting the nature of transactions and nation states.

###### **Chairs/Discussants:**

- Juho Lindman, Director of GU Blockchain Lab, Swedish Center for Digital Innovation, and member of CIP Academic Faculty
- Thibault Schrepel, Assistant Professor Antitrust Law, Utrecht; Faculty Associate, Harvard
- Primavera De Filippi, Researcher at CNRS and Berkman-Klein Center at Harvard Alchemist at DAOstack Director at COALA Global

##### **2. Open Source Strategy**

**Description:** The digitization of industry over the past 20 years has turned open source into a strategic activity that impacts the business decisions of nearly all firms



in one way or another. This session will chart the rise of open source and discuss its role in the future development of product and services across multiple sectors.

**Chairperson:** Keith Bergelt, CEO, Open Invention Network

**Discussants:**

- Karen Copenhaver, Counsel, Linux Foundation
- Fred Mau, Intellectual Property Counsel, Toyota Motor Engineering & Manufacturing, North America
- David Levine, VP, Assistant General Counsel, Red Hat
- Roger Shang, Senior Director, Alibaba
- Audrey Plantureux, Intellectual Property Manager, OVH

### 3. IP & Digitalization in Industry Verticals

**Description:** Digitalization manifests itself in many different areas, including connectivity, data, AI/ML, open source software, etc. This session will explore a broad set of IP challenges impacting several industry verticals undergoing digital convergence and discuss the need for new solutions.

**Chairperson:** Talal Shamon, CEO, Intertrust

**Discussants:**

- Eeva Hakoranta, Executive Vice President, Chief Licensing Officer, Interdigital
- Ray Millien, CIPO, Volvo Cars
- Maikke van Velzen, Head of IP Portfolio management, Philips
- Cameron Briggs, General Manager, Future Energy, Origin Energy



## **DAY 3 – Globalization**

### **Wednesday, December 9<sup>th</sup>**

#### **Plenary Sessions (09:00-10:30)**

##### **09:00-09:30 Globalization of Innovation Keynote**

Stephen Haber, Professor, Stanford University; Senior Fellow, The Hoover Institution

##### **09:30-10:30 Globalization of Innovation Panel**

**Moderator:** Joe Felter, Stanford University, fm Deputy Assistant Secretary of Defense

**Panelists:**

- Niall Ferguson, Senior Fellow, The Hoover Institution
- Jen Santos, Naval R&D Investment Executive, US Department of Navy
- Mark Cohen, Director and Distinguished Senior Fellow, UC-Berkeley School of Law
- Stephen Haber, Professor, Stanford University; Senior Fellow, The Hoover Institution

#### **10:30-10:45 Coffee Break**

#### **Workshop Sessions (10:45-12:00)**

##### **1. Licensing 2.0 – Can we build win-win licensing platforms?**

**Description:** With the explosion of digital services and multi-technology products across all sectors, the associated patent exposure has increased dramatically. This session will discuss how we might overcome historical licensing challenges and build win-win platforms that incentivize participation by both licensees and licensors.

**Chairperson:** Gustav Brismark, Owner, Kazehara; fm CIPO, Ericsson

**Discussants:**

- Giustino de Sanctis, CEO and Founder, Aliante
- Mattia Fogliacco, President, Sisvel Group
- Luke McElroy, Senior Vice President, Avanci
- Ruud Peters, CEO at Peters IP Consultancy B.V. ; Former Chief IP Officer and Executive Vice President at Koninklijke Philips N.V.

##### **2. Global IP Strategy**

**Description:** The geographical nature of the IP system combined with the globalization of business creates both opportunities and threats for technology firms. This session will explore how firms can build an IP strategy from a global perspective to both manage risk and support business growth opportunities.

**Chairperson:** Rob Sterne, Founding Director, Sterne, Kessler, Goldstein & Fox





**Discussants:**

- Tobias Wuttke, Head of Legal Department, Meissner Bolte
- David Rose, Partner - Intellectual Property, Mishcon de Reya
- James Zhu, Partner, JunHe

**3. Proactive Business-focused IP Management – making it work at Volvo Group**

**Description:** For IP management to play a key strategic role in driving a firm's business goals, it must be both business-focused and proactive. This session will describe the journey to accomplish this goal at Volvo Group.

**Chairpersons:**

- Michael Hatrick, Group Director IP Strategy & Portfolio, Volvo Group
- Linus Eklund, Group Director, Patents, Volvo Group



## DAY 4 – Institutionalization Thursday, December 10<sup>th</sup>

### Plenary Sessions (09:00-10:30)

#### 09:00-09:20 Keynote 1

Antonio Campinos, President, EPO

#### 09-20-09:40 Keynote 2

Andrei Iancu, Director, USPTO

#### 09:40-10:15 Panel Discussion

**Moderator:** David Kappos

**Panelists:**

- Andrei Iancu, Director, USPTO
- Antonio Campinos, President, EPO

#### 10:15-10:45 Coffee Break

### Workshop Sessions (10:45-12:00)

#### 1. Boosting your strategy with IP in high-growth technology businesses

**Description:** This session builds on the EPO's successful series of SME case studies that show how young and established technology SMEs have developed the IP management capabilities they need, and how they are using IP strategically to their advantage. Using an illustrative IP success story in med tech and some practical frameworks, this session will explore how intellectual property management can add value to your business from a strategic perspective.

**Chairperson:** Thomas Bereuter, European Patent Academy, EPO

**Discussants:**

- Yann Ménière, Chief Economist, EPO
- Alexandre Tsoukalis, Managing Director and CTO, Micrel Medical Devices
- Miguel Domingo Vecchioni, Examiner and team manager, EPO

#### 2. IP & Entrepreneurship - The impact of IP on startup funding and growth

**Description:** From the earliest days of our nation, entrepreneurs and inventors have been among the iconic heroes that defined our country and continuously reinvigorated our economy, often challenging entrenched incumbents by being more flexible and nimbler and more dedicated to their new ideas. The US economy, for most of our history, has been the embodiment of the "gales of destruction" envisioned by Joseph Schumpeter. In the last 10-15 years, the ability of entrepreneurs to challenge incumbents has declined, especially in the electronic



industries, but also in medical devices and few other areas dominated by entrenched monopolies and oligopolies, and with that decline, the interest of those who invest in high risk technologies and the entrepreneurs who would pursue them has also declined. The causes and potential mitigations for this are complicated and sometimes obscure. The panel will bring broad and diverse perspectives to explore these phenomena.

**Chairperson:** Robert Taylor, Owner and Founder, RPT Legal Strategies

**Discussants:**

- Gary Lauder, Managing Director, Lauder Partners
- Jonathan Barnett, Professor, Gould School of Law, USC
- Earl Bright, President and General Counsel, ExploraMed Development
- Jeanne Suchodolski, Counsel, US Navy Office of General Counsel
- Matteo Sabattini, Director, IPR Policy, Ericsson

### 3. IP Finance

**Description:** Transforming IP into a financial asset has been a consistent challenge, especially for patent-based assets. This session will explore the historical obstacles to IP finance, present a number of new solutions, and discuss the reasons for the current advancement in field.

**Chairperson:** Ron Laurie, Executive Chairman & CIPO, InventionShare

**Discussants:**

- Jon Calvert, Partner - IP Advisory, Deloitte Corporate Finance
- Brian Hinman, Chief Innovation Officer, Aon Intellectual Property Solutions
- Keith Bergelt, CEO, Open Invention Network
- Ludo Pyis, Partner & Co-founder, Lanterna Capital



## **DAY 5 – Professionalization**

### **Friday, December 11<sup>th</sup>**

#### **Plenary Sessions (09:00-10:30)**

##### **09:00-09:30 Professionalization Keynote**

- Suzanne Harrison, Principal, Percipience
- Dan McCurdy, CEO, RPX

##### **09:30-10:30 Professionalization Panel**

**Moderator:** Joff Wild, Editor, IAM Magazine

**Panelists:**

- Ruud Peters, CEO at Peters IP Consultancy B.V. ; Former Chief IP Officer and Executive Vice President at Koninklijke Philips N.V.
- Charlotta Ljungdahl, Group Senior Vice President, Head of Intellectual Property, ABB
- Kent Richardson, CEO, RichardsonOliver Insights
- Keith Bergelt, CEO, Open Invention Network

##### **10:30-10:45 Coffee Break**

#### **Workshop Sessions (10:45-12:00)**

##### **1. IP Teams of 2025**

**Description:** The challenges of diversification, digitalization, and globalization creates new requirements and challenges on the IP team of the future. This session will take its starting point in the direction that in-house IP teams are heading as we enter this decade and what forces are driving this. This situation will be discussed from three perspectives: (1) internal forces within the business; (2) the forces acting on the IP service provider market, such as deregulation and disintermediation; and, finally (3) forces external to the business such as geopolitical, macroeconomic and technological forces.

**Chairpersons:**

- Tim Smith, Principal, Rouse
- Chris Bailey, Principal, Rouse

**Discussants:**

- Maikke van Velzen, Head of IP Portfolio management, Philips
- Peter Fiske, Executive Director - National Alliance for Water Innovation (NAWI); Director, Water-Energy Resilience Institute, Lawrence Berkeley National Laboratory (Berkeley Lab)
- Jeremiah Chan, Director and Associate General Counsel at Facebook; Patent Public Advisory Committee Member, USPTO; DEI Advocate



- Rachel Adams, Vice President, Deputy General Counsel, IDG/PCSD General Counsel, Lenovo
- Ben Wang – Managing Director of Pacific Viewpoint Group, and most recently, VP and Chief IP Counsel of ZTE

## 2. Patent Analytics

**Description:** This session will discuss how analytics is transforming the profession of IP management in an era of global, digital transformation. With diverse backgrounds, the panelists will cover the following topics: (1) How IP analytics have been brought into business decisions; (2) The need for adaptability of those in the IP management industry; (3) How introducing analytics is as much about change management as it is about the underlying analytics; (4) How IP analytics provides a competitive advantage to those able to incorporate them into their decision-making process. For those managing IP, or new to the field, the panel session will provide guidance on how to adapt to the changing landscape presented by IP analytics.

**Chairpersons:**

- Kent Richardson, CEO Richardson Oliver Insights; Partner ROL Group.

**Discussants:**

- Nigel Swycher, CEO, Cipher
- Cassandra Derham, Senior IP attorney, Head of Technical IP, Amadeus Intellectual Property
- Jard van Ingen, CEO and Co-Founder, Focus

## 3. Trade Secret Management

**Description:** This session will combine an academic and practitioner perspective focusing on (1) how the recent changes in the legal framework for trade secrets may influence the way in which businesses share knowledge, collaborate and engage in open innovation and (2) the practical challenges of transactions for the transfer of knowledge within the context of various legal systems.

**Chairperson:**

- James Pooley, Trade Secrets Litigator, Advisor and Expert; fm Deputy Director General, WIPO
- Haakon Thue Lie, Managing Partner Leogriff; Associate Professor, NTNU

**Discussants:**

- Donal O'Connell, Managing Director, Chawton Innovation Services
- James Pooley, Trade Secrets Litigator, Advisor and Expert; fm Deputy Director General, WIPO
- Nicola Searle, Senior Lecturer at Goldsmiths, University of London
- Katharina Behrend, DPhil in Law Candidate, University of Oxford
- Sharon K. Sandeen, Professor and Director of the IP Institute, Mitchell Hamline School of Law



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20<sup>TH</sup>  
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