

Advanced Licensing Agreements 2009

San Francisco, February 26-27, 2009

New York City, March 26-27, 2009

Chicago, April 27-28, 2009

Live Webcast, February 26-27, 2009 — www.pli.edu

- *New:* Obtain Critical Pointers for Managing Your Portfolio to Maximize Licensing Opportunities
- *New:* Learn Winning Negotiation Strategies
- Breakout Sessions:
 - In-Depth Panel Discussion of a Complex Technology License Agreement
 - In-Depth Mock Negotiation of a Complex Content License Agreement
 - International Licensing: Asia
 - International Licensing: Europe
- Earn MCLE Ethics Credit:
Ethical Considerations in Licensing

Do You Know There Are 5 Ways To Attend PLI's Programs? *See inside for details...*

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Why You Should Attend

Intellectual property transactions play a critical role across a variety of industries. Whether licensing patents, copyrights, trade secrets or trademarks, the ability to structure, draft and negotiate complex license agreements is critical to a successful transaction. This program is designed to address some of the more complex and practical issues that arise in drafting and negotiating IP licenses, as well as tips to manage your patent portfolio to optimize sale or licensing.

This program will feature updates on current legal developments, best practices, negotiating frequently contested issues, identifying and avoiding common pitfalls, keeping the relationship on track, litigation planning and avoidance, and ethics. The speakers will illustrate both outside counsel and in-house perspectives.

What You Will Learn

- Tips on how to avoid the most frequently made mistakes in patent and technology licensing
- Learn about recent developments in copyright and content licensing
- Understand representations, warranties and indemnifications in software licensing
- Understand IP issues in strategic alliances and other joint development agreements: Instructive “war stories”
- Master key points for database protection under U.S. and EU law
- Obtain critical updates on the legal enforceability of open source licenses
- Gain insight into litigation planning for licensing lawyers
- Understand special issues in trade secret licensing
- Learn trademark law developments and how they relate to licensing

Who Should Attend

This advanced program is focused on those who already have experience in the substantive area of intellectual property law, and who devote a substantial amount of their practice to licensing.

Sally M. Abel

Fenwick & West LLP
Mountain View, California

Lucy J. Billings

Vice President, Legal - Licensing
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Helen Dutton

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Paul H. Arne

Morris, Manning & Martin, LLP
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Carter Ledyard & Milburn LLP
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Melvin C. Garner

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New York City

Marcelo Halpern

Latham & Watkins LLP
Chicago

Mark S. Holmes

C.E.O.
PatentBridge LLC
Menlo Park, California
Author, *Patent Licensing: Strategy*
• Negotiation • Forms (PLI)

Kenneth M. Kaufman

Manatt, Phelps & Phillips, LLP
Washington, D.C.

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Co-Chairs:



Ira J. Levy

Goodwin Procter LLP
New York City



Joseph Yang

PatentEsque Law Group, LLP
Menlo Park, California

SAN FRANCISCO & LIVE WEBCAST

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Naomi Abe Voegtli

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NEW YORK CITY

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• Negotiation • Forms (PLI)

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PROGRAM

Please plan to arrive with enough time to register before the conference begins.
A continental breakfast will be available upon your arrival.

FIRST DAY: 9:00 A.M. - 5:15 P.M.

Morning Session: 9:00 a.m. – 1:00 p.m.

9:00

Introduction

SF, NYC, CHI & WEB: *Ira J. Levy, Joseph Yang*

9:15

Patent and Technology Licensing

- Avoiding the most frequently made mistakes
- Technology vs. IP vs. blended licenses
- Why patent licensing is different
- Understanding grant types and degrees of exclusivity
- Indemnification and change of control issues
- Negotiation strategies
- Comparing licensee and licensor perspectives

SF, NYC, CHI & WEB: *Joseph Yang*

10:15

Special Issues in Trade Secret Licensing

- Differences in protection from state to state
- Differences in enforcement from state to state
- Protecting the trade secret in case of unauthorized disclosure
- Drafting considerations and sample clauses
- Special considerations compared to licensing other IP asset types

SF, NYC & WEB: *Peter J. Kinsella*

CHI: *Patrick J. Whalen*

11:15 *Break*

11:30

Copyright, Content, and Trademark Licensing

- Old media vs. new media, e-publishing & *Tasini* issues
- Digital rights management (DRM) and related issues
- Licensing rights in preexisting content vs. newly created content
- The latest on quality control considerations
- The latest on trademark licensing
- Sample licensing provisions
- Case law update and licensing implications

SF & WEB: *Sally M. Abel, Kenneth M. Kaufman*

NYC: *Stephen G. Charkoudian, Kenneth M. Kaufman*

CHI: *Kenneth M. Kaufman, Krista L. Nunemaker*

1:00 *Lunch*

Afternoon Session: 2:00 p.m. – 5:15 p.m.

2:00

Software Licensing

- Source code issues
- Representations, warranties and indemnification
- Revenue sharing and auditing
- Training and support
- Keeping the relationship on track

SF, NYC, CHI & WEB: *Mark S. Holmes*

3:00 *Break*

3:15 **BREAKOUTS**

I. Analysis of a Content License Agreement

- Walkthrough and mock negotiation of a complex content license agreement by an expert panel
- Structuring IP rights allocation
- Negotiating multimedia rights
- Allocating merchandising rights
- Negotiating creative control issues
- Funding and royalty sharing considerations
- Interplay of technology and content issues for digital content

SF & WEB: *Kenneth M. Kaufman, Thomas A. Magnani, Katherine C. Spelman*

NYC: *Rose Auslander, Kenneth M. Kaufman, Jonathan Sirota*

CHI: *Kenneth M. Kaufman, Jessica L. Rothstein, Katherine C. Spelman*

II. Analysis of a Technology License Agreement

- Common pitfalls
- Confidentiality and trade secret issues
- Exclusivity
- Restricted fields of use
- Specifications
- Warranties and indemnification

SF & WEB: *Lucy J. Billings, Mark S. Holmes, Marc P. Schuyler*

NYC: *Melvin C. Garner, Mark S. Holmes, Ira J. Levy*

CHI: *Mark S. Holmes, Ira J. Levy, Rebecca P. Rokos*

4:15

Strategic Alliances and Other Joint Development Agreements

- IP creation conflicts: Default laws vs. parties' intentions
- IP allocation: Joint ownership vs. field-based ownership vs. separate entity
- IP enforcement: Contractual provisions; unauthorized licensees; joinder requirements
- IP de-allocation: Facilitating or inhibiting separation; bankruptcy
- Interplay with IP asset management
- Corporate vs. university partners
- "War stories" from real life deals

SF, NYC, CHI & WEB: *Joseph Yang*

5:15 *Adjourn*

SCHEDULE

SECOND DAY: 9:00 A.M. - 4:30 P.M.

Morning Session: 9:00 a.m. – 12:15 p.m.

9:00

Database License Agreements/ Open Source Issues

- Database protection under U.S. and EU law
- Key points in negotiating database licenses
- Recent developments in database protection and litigation
- Recent developments in legal enforceability of open source licenses
- Comparing popular open source licenses
- Patent issues in open source licenses

SF & WEB: *Christian H. Nadan, Mark G. Tratos*

NYC: *Paul H. Arne, Jeffrey D. Neuburger*

CHI: *David G. Rickerby, Mark G. Tratos*

10:00

Litigation Planning for Licensing Lawyers

- Warranties, indemnification and other frequently litigated provisions
- Pitfalls, and examples, of sloppy wording
- Contra proferentum and other contract interpretation doctrines
- Alternative dispute resolution
- Case law update
- Foreign litigants and/or venues

SF, NYC, CHI & WEB: *Ira J. Levy*

11:00 *Break*

11:15 BREAKOUTS

I. International Licensing – Asia

- Similarities and differences between domestic and Asian licensing
- Common pitfalls for U.S. lawyers doing Asian deals
- Licensing in Asia
- Cultural issues in Asian transactions

SF, NYC & WEB: *Naomi Abe Voegtli*

CHI: *Rory J. Radding*

II. International Licensing – Europe

- Similarities and differences between domestic and European licensing
- Common pitfalls for U.S. lawyers doing European deals
- Licensing in Europe
- Cultural issues in European transactions

SF, CHI & WEB: *Jeremy Schrire*

NYC: *James Marshall*

12:15 *Lunch*

Afternoon Session: 1:15 p.m. – 4:30 p.m.

1:15

Managing Your Patent Portfolio to Maximize Licensing Opportunities

- Ownership issues (chain of title, security interests, liens, etc.)
- Standards body issues (RAND, injunctions, antitrust, etc.)
- Inventor/prior owner issues (joint ownership, retained rights, lack of corporate institutional knowledge, etc.)
- Outstanding grants issues (reasonable royalty precedents, right to sublicense, etc.)
- Portfolio issues (quantity vs. quality, age, etc.)
- Market maturity issues (patent life cycle, claim shaping through continuations, etc.)
- Claims scope/strategy issues (invalidity, infringement, design-around)
- Economic issues (impacted revenue, up-front vs. revenue sharing, valuation, etc.)
- Post-signing cooperation issues (prosecution, enforcement, challenges)

SF & WEB: *Helen Dutton (moderator),*

Dennis R. Gallagher, Dallas R. Martin,

Joseph Yang

NYC: *Ira J. Levy (moderator), Robert A. Myers,*

Gail H. Zarick

CHI: *Ira J. Levy (moderator), Tom Mavrakakis,*

Don Merino

2:15 *Break*

2:30

Negotiation Skills and Tactics

- Preparing for license negotiations
- Understand the use of psychological tools when dealing with other parties
- Consensus and bridge building
- Win-win negotiation versus positional bargaining

SF & WEB: *Donna Shestowsky*

NYC: *Harry Rubin*

CHI: *Marcelo Halpern*

3:30

Ethical Considerations in Licensing

- Drafting in anticipation/avoidance of litigation
- What happens when a friendly deal turns litigious
- Deceit and candor
- Cross-border transactions
- Communications with adverse parties

SF, CHI & WEB: *Mark G. Tratos*

NYC: *David Rabinowitz*

4:30 *Adjourn*

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TREATISES

Patent Licensing: Strategy • Negotiation • Forms

Mark S. Holmes (CEO, PatentBridge LLC, Menlo Park, California)

Patent Licensing gives you the comprehensive legal and technical information you need to draft effective licensing agreements. Enhanced by hundreds of adaptable document provisions, **Patent Licensing** enables you to grant exclusive patent licenses • establish the duration of licenses and termination guidelines • define royalties and payment schedules • bring licensed products to market ASAP • get adequate representations from licensors • ensure licensees meet obligations • protect against infringement of licensed patents • maintain the confidentiality of license agreements • and settle disputes via arbitration.

A major new chapter discusses how recent court decisions have altered several established tenets of patent law that were relied upon in drafting patent license agreements. As a result, transactional attorneys face a challenge in drafting provisions in agreements that limit the application of such case law when it is adverse to their clients’ interests.

1 looseleaf volume, 866 pages, \$275 (Revised annually: No charge for revision issued within 3 months of purchase)



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Jeffrey G. Sheldon (Sheldon Mak Rose & Anderson, Pasadena, California)

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