



PATENT MASTERS™ SYMPOSIUM

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Standard Essential Patents: Striking a Balance Between Competition & Innovation*

Tuesday, September 10, 2019	
8:00am to 8:30am	Registration & Breakfast
8:30am to 8:45am	Gene Quinn: Welcome & Introductions
8:45am to 9:30am	Keynote <i>Commissioner Christine Wilson, Federal Trade Commission</i>
Session #1 9:30am to 10:45am	Myths, Realities and Misconceptions About Standard Essential Patents <i>Matteo Sabattini, Director IP Policy, Ericsson</i> <i>Moderated by Gene Quinn</i> There are a variety of myths surrounding standard essential patents, including that technology becomes valuable because it is declared a standard. This opening session will explore common misperceptions and discuss the underlying tensions between innovators, who wish to be paid more, and implementers, who wish to pay less.
10:45am to 11:15am	BREAK
Session #2 11:15am to 12:30pm	Disharmony Between DOJ & FTC on Antitrust Enforcement of Licensing of SEPs? <i>F. Scott Kieff, Former ITC Commissioner</i> <i>Moderated by Gene Quinn</i> Assistant Attorney General Makan Delrahim has withdrawn assent to the 2013 Joint DOJ-USPTO Policy Statement on Remedies for Standard Essential Patents, and signaled concern over collusion of licensees who are refusing to deal with technology innovators. Meanwhile, the Federal Trade Commission has pursued a case against Qualcomm and won a ruling in a bench trial in the Northern District of California ordering Qualcomm to license SEPs to competitor Intel. The agencies that normally proceed in lock-step seem out of sync with respect to whether the refusal to license SEPs.
12:30pm to 2:00pm	Lunch & Keynote: TBA

* **DRAFT as of June 11, 2019.** The Agenda is subject to change.

<p>Session #3 2:00pm to 3:15pm</p>	<p>FRAND & Willing Licensees: What is Fair, Reasonable and Non-Discriminatory</p> <p><i>Gregory Sidak, Chairman, Criterion Economics Moderated by John White</i></p> <p>Those contributing patented technologies to the development of a standard are asked to provide a FRAND (which stands for Fair, Reasonable and Non-Discriminatory) assurance, in essence committing to providing access to patents that are or may become essential to the implementation of the standard. But what is fair, reasonable and non-discriminatory? The terms are easy to say, but difficult to parse. More difficult when licensees refuse to engage in good faith in an age of efficient infringement. This segment will discuss, among other things, the 2017 decision in <i>TCL v. Ericsson</i> that while Ericsson negotiated in good faith, their licensing offers were not FRAND rates. In addition, we will discuss <i>In re: Qualcomm Litigation</i> where Qualcomm alleges that Apple has forfeited entitlement to FRAND by not being a willing licensee.</p>
<p>3:15pm to 3:45pm</p>	<p>BREAK</p>
<p>Session #4 3:45pm to 5:00pm</p>	<p>The 5G Landscape: FRAND Principles for Licensing 5G SEPs</p> <p><i>David Long, Editor, Essential Patent Blog Kim Chotkowski, VP, InterDigital Moderated by John White</i></p> <p>While consumers wouldn't get connected to 5G platforms without the technology implementers, 5G technology wouldn't exist for technology implementers to roll out in the first place without the significant investment of 5G innovators. While it is important not to minimize the contributions of those technology implementers across the final mile to consumers, the likes of Ericsson and Qualcomm have paved the way for innovation of 5G technology from the ground up.</p>
<p>5:00pm to 5:30pm</p>	<p>TBA</p>
<p>5:30pm to 9:00pm</p>	<p>Optional Cocktail Reception & Dinner: <i>Open Bar with Hors d'oeuvres followed by Dinner</i></p>

Wednesday, September 11, 2019	
8:00am to 9:00am	Continental Breakfast
9:00 to 9:30am	TBA
Session #5 9:30am to 10:45am	<p>The Role of Injunctive Relief for the Infringement of Standard Essential Patents</p> <p><i>Michael Renaud, Partner, Mintz Levin Moderated by Gene Quinn</i></p> <p>Innovators believe injunctions are necessary to address widespread patent infringement that has occurred in recent years and have applauded the decision of Assistant Attorney General Makan Delrahim to withdraw assent to the 2013 Joint DOJ-USPTO Policy Statement on Remedies for Standard Essential Patents. But in <i>Apple v. Motorola</i>, 757 F.3d 1286 (Fed. Cir. 2014), Motorola was denied an injunction for a FRAND committed patent and American courts have tended to take a categorically hostile view toward awarding injunctions against implementers. Questions of a hold-up are encountered when owners of SEPs seek an injunction or an exclusion order or cease and desist from the ITC. Unfortunately, without exclusion, innovators believe FRAND has become a one-sided transfer of rights from innovators to implementers.</p>
10:45am to 11:15am	BREAK
Session #6 11:15am to 12:30pm	<p>International and Cross-Border Litigation of Standard Essential Patents</p> <p><i>Theodore Essex, Sr. Counsel, Hogan Lovells Moderated by Gene Quinn</i></p> <p>An issue of growing importance is with respect to whether national courts have authority to set a worldwide FRAND rate. In October 2018 The Court of Appeals in the UK affirmed Mr. Justice Birss' decision finding that a FRAND rate may be global and that Unwired Planet was justified in offering a global license to Huawei. Essentially, the Court upheld Birss' interpretation of the requirements of <i>Huawei v. ZTE</i> and found Unwired Planet did not abuse a dominant position. But this begs the question about whether parties will (or even should) now race to an agreeable jurisdiction in hopes of obtaining favorable rulings from ideologically aligned jurists.</p>

12:30pm to 2:00pm	Lunch Keynote: TBA
Session #7 2:00pm to 3:15pm	<p>Changing SSO IP Policies Devalue Patents</p> <p><i>Professor Kristen Osenga, The University of Richmond School of Law</i> <i>Moderated by John White</i></p> <p>Companies as well as commentators have been pushing SSOs to change their IP policies to be less friendly to patent holders. Based on unproven theories, like patent holdup and royalty stacking, these parties are encouraging SSOs to change their rules to disallow injunctive relief for infringement of standard essential patents. Policies are even being changed retroactively. This session will discuss recent IP policy changes made by the IEEE, as well as how the IEEE's governance structure was particularly helpful in allowing companies and commentators to encourage this shift. We will also consider efforts to make changes at other SSOs, including ANSI, as well as where similar efforts have failed, such as ETSI.</p>
3:15pm to 3:45pm	BREAK
Session #8 3:45pm to 5:00pm	<p>Using the PTAB to Challenge SEPs</p> <p><i>David Cohen, Kidon IP Corporation</i> <i>Kevin Jakel, Unified Patents</i> <i>Moderated by John White</i></p> <p>There has been an aggressive push to challenge certain Standard Essential Patents at the Patent Trial and Appeal Board (PTAB) by Unified Patents. For example, Unified has been challenging patents in patent pools relating to high efficiency video coding (HEVC) despite the lack of any publicly reported litigation. Meanwhile, the PTAB continues to allow Unified Patents to challenge without identifying its benefactors as a real-party-in-interest, even ruling that Alphabet is not a real-party-in-interest with Google despite Federal Circuit precedent that seems to directly mandate a contrary outcome.</p>
5:00pm to 5:30pm	TBA

Faculty (alphabetically by last name)

David Cohen is an intellectual property strategist with experience in the offensive and defensive sides of global, intellectual property monetization. He operates on an outsourced Chief IP Officer model and provides legal services through his law firm and IP-business related services (including patent brokering and legal process and/or IP-business or M&A focused consulting) through Kidon IP Corporation. David is the former Chief Legal and IP

Officer of Vringo Inc. Prior to Vringo, he was senior in-house counsel at Nokia Corporation. He worked at the law firms of Lerner David and Skadden Arps before joining Nokia. David also clerked for Chief Judge Carman of the Court of International Trade.

Kim Chotkowski is Vice President and Head of Licensing Strategy and Operations for InterDigital, Inc. Prior to re-joining InterDigital in January 2019, Kim was Chief Executive Officer for the Licensing Executives Society (U.S.A. and Canada), Inc., and before that was President of Brandywine Ventures LLC. Kim is an accomplished patent attorney and licensing executive with over 25 years of professional legal and business experience. She holds a degree in electrical engineering from Worcester Polytechnic Institute, a Juris Doctorate from the University of New Hampshire School of Law and an MBA in international business and finance from Sacred Heart University. She has also been named as one of the top IP strategists in the world by IAM every year since 2009.

Theodore Essex served as a U.S. International Trade Commission (ITC) judge for a decade, and is now Senior Counsel at Hogan Lovells in Washington, D.C. In addition to being admitted to the bars in the District of Columbia and Louisiana, he is also a registered solicitor in England and Wales. Ted has been hailed an unofficial ambassador to intellectual property lawyers and judges throughout the U.S., Asia, and Europe, and during his time at the ITC handled some of the most important and noteworthy Section 337 intellectual property infringement proceedings involving the world's most valuable and renowned companies. Before joining the ITC, Ted served 20 years in the U.S. Air Force as a Judge Advocate, where he had extensive international practice, gained experience working with labor, criminal and EEO law, and managed large offices of lawyers and staff. During this time Ted trained hundreds of attorneys, gave numerous lectures and published in variety of areas.

Kevin Jakel is Founder and CEO of Unified Patents. Prior to founding Unified Patents, Kevin served as Intuit's Head of IP Litigation. Kevin previously practiced as a patent litigator with Kaye Scholer LLP and Howrey LLP and advised clients on intellectual property strategy, litigation and patent prosecution. Kevin began his career in IP as a patent examiner at the U.S. Patent & Trademark Office. Kevin has a JD from George Washington University Law School and a BS in Mechanical Engineering from UCLA.

F. Scott Kieff served as a Commissioner of the U.S. International Trade Commission from October 2013 through June 2017. Kieff is recognized as an expert in technology law, business, national security, international trade, intellectual property and antitrust. Prior to his appointment to the ITC, Kieff was a Senior Fellow at the Hoover Institution, and a Professor of Law at The George Washington University Law School. Upon stepping down from his post at the ITC, Kieff returned to both Hoover and GW Law School, and in 2018 he also established Kieff Strategies LLC, through which he provides strategic consulting, dispute resolution, expert litigation advice and expert testimony.

David Long is a patent attorney and the Editor of *Essential Patent Blog*. David has over twenty-five years of telecommunications experience, including over twenty years leading complex patent litigation in federal district and appellate courts. He counsels domestic and international clients on intellectual property issues such as patent litigation, licensing, trade secrets, patent reexamination, product clearance and redesign. David is a commentator and author on patent litigation issues and has appeared and been published in *The Wall Street Journal*, *Bloomberg*, *Bloomberg TV*, *IT World*, *IPLaw360*, *Inside Counsel* and *The National Law Journal*, among others. David previously served as a judicial law clerk for the Hon. S. Smith at the U.S. Court of Appeals for the Federal Circuit (1995-1996).

Kristen Jakobsen Osenga is a Professor of Law at The University of Richmond School of Law. Professor Osenga teaches and writes in the areas of intellectual property, patent law, law and language, and legislation and regulation. Her scholarship focuses on the intersection between law and linguistics in patent claim construction as well as other aspects of patent law, including Standard Setting Organizations (SSOs) and the IEEE amended guidelines. Professor Osenga is a frequent speaker at symposiums on patent law and intellectual property and has made numerous presentations to academics and practitioners on these topics. Prior to joining academia, she practiced patent law at Finnegan Henderson and clerked for Judge Richard Linn of the Court of Appeals for the Federal Circuit. She is also a Senior Scholar at the Center for the Protection of Intellectual Property.

Gene Quinn is a patent attorney and a leading commentator on patent law and innovation policy. He is the Founder and Publisher of IPWatchdog.com. IPWatchdog.com has been recognized multiple times by the American Bar Association as a top 100 legal blog, multiple times as the top IP blog, and in 2014 was inducted into the *ABA Blawg Hall of Fame*. Gene has twice (2017 & 2018) been recognized by *IAM Magazine* as one of the top IP strategists in the world. He has also been recognized by *Managing Intellectual Property* as one of the 50 Most Influential People in IP (2014). Regarded as an expert on software patentability and U.S. patent procedure, Gene's particular specialty is in the area of strategic patent consultancy, portfolio building, and patent prosecution strategies.

Mike Renaud is Division Head for the Intellectual Property Section at Mintz, Levin, Cohn, Ferris, Glovsky and Popeo, P.C. and serves as a member on the firm's Policy Committee. He is an experienced litigator with a background in mechanical engineering and 25 years of experience practicing law, he has the combination of technical and legal skills essential to a strategic patent practice. Mike has significant experience litigating Section 337 matters before the International Trade Commission (ITC) and has also achieved significant success in Federal District Courts. Michael's technology experience includes electromechanical systems, digital cameras, embedded microprocessors, telecommunications and network software, cellular phones, and e-commerce, among others.

William Rinner is Chief of Staff and Senior Counsel at the U.S. Department of Justice, Antitrust Division. Among other responsibilities, he has advised the Assistant Attorney General on matters in the Appellate, Healthcare and Consumer Products, and Competition Policy and Advocacy sections, as well as on policy issues involving technology and intellectual property. Before joining the Division, Bill was an antitrust litigator in private practice in Washington, D.C. Bill previously clerked for the Honorable Richard Posner of the United States Court of Appeals for the Seventh Circuit. Bill is a graduate of Yale Law School and University of Notre Dame.

Matteo Sabattini is a Director of IP Policy for Ericsson. In addition to his duties with Ericsson, Sabattini also serves as Senior Vice President of Standards for the Licensing Executives Society (USA and Canada), is a Member of the Intellectual Property Committee of the IEEE-USA and is Technical Policy Coordinator for IEEE Region 2. Previously, Sabattini was the Chief Technology Officer for Sisvel Group and he also served as President and CEO of Sisvel technology. Sabattini holds an M.S. in Electrical Engineering from the University of Bologna, a Ph.D. in Communication Theory and Systems from the University of California, San Diego, and an MBA in Business Administration from The George Washington University.

J. Gregory Sidak is Chairman of Criterion Economics, LLC. Greg has extensive experience in matters concerning antitrust, patents, and regulation of network industries (including the Internet, telecommunications, media, content, and energy). studied law and economics at

Stanford University and served as Judge Richard Posner's first law clerk. He has served as a senior staff member of the President's Council of Economic Advisers and Deputy General Counsel of the Federal Communications Commission. He currently edits the *Journal of Competition Law & Economics* for the Oxford University Press, and has held academic positions at Yale, Georgetown, Tilburg, and the American Enterprise Institute for Public Policy Research. His books and articles have been cited by the Supreme Court of the United States, the Supreme Court of Canada, the European Commission, and other courts and regulatory agencies. He has testified before the U.S. Congress on multiple occasions, and he has written extensively on the topic of Standard Essential Patents.

John White is a patent attorney and lecturer. He is an Adjunct Law Professor at the University of Virginia School of Law and is the principal lecturer in the PLI Patent Bar Review Course. John also teaches a patent practice course for new practitioners. Since John began teaching in 1995, he has personally taught at least 50% of all practicing patent attorneys and patent agents. John has also taught numerous U.S. Patent Examiners at the USPTO in the "Law and Evidence Course" necessary for them to advance to Partial Negotiation authority as Examiners. John serves as an expert witness in patent litigations and is regarded as a leading authority on patent practice and procedure in the United States. He maintains a selective patent practice with Berenato & White, LLC, largely aimed at assisting start-up technology companies increase and monetize their patent portfolios.

Christine S. Wilson was sworn in on September 26, 2018 as a Commissioner of the Federal Trade Commission. President Donald J. Trump named Wilson to a term that expires on Sept. 25, 2025. Wilson previously served at the FTC as Chairman Tim Muris' Chief of Staff during the George W. Bush Administration, and as a law clerk in the Bureau of Competition while attending Georgetown University Law Center. In between her periods of service at the FTC, Wilson practiced competition and consumer protection law both at law firms and as in-house counsel. When nominated, Wilson was serving as Senior Vice President — Legal, Regulatory & International for Delta Air Lines. Prior to joining Delta, Wilson was a member of the Washington DC antitrust practice groups of Kirkland & Ellis LLP and O'Melveny & Myers LLP. Early in her career, Wilson worked with former Assistant Attorney General James F. Rill at Collier Shannon Rill & Scott on a variety of competition law and policy initiatives, including the final report of the International Competition Policy Advisory Committee commissioned by Attorney General Janet Reno. Wilson graduated *cum laude* from Georgetown University Law Center and she graduated Phi Beta Kappa from the University of Florida.

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