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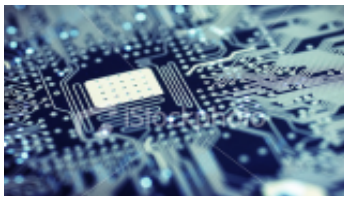
ANALYZING GLOBAL TECHNOLOGY INNOVATIONS USING STRATEGIC INTELLIGENCE AND
COMPETITIVE ANALYSIS INFORMATION FROM THOMSON INNOVATION



THOMSON REUTERS

GLOBAL TECHNOLOGY INNOVATIONS IN 2007

In recognition of the essential role patenting plays in the world's global economy, the Scientific business of Thomson Reuters has reviewed technology innovations developing globally in 2007. The following report highlights tri-lateral inventions or inventions that have been filed in the U.S., Europe and Japan.



Examining the patent landscape is an excellent way to measure the evolution of global technology innovations. As our research shows, there has been a noticeable rise in innovations in many areas of technology. In this report, we look at those areas of technology that produced the highest number of patent filings in the full year 2007.

KEY STUDY FINDINGS:

- Four areas of technology are truly exemplary in protecting high volumes of inventions: consumer electronics, computing, telecommunications and entertainment and business services technology.
- Protection for computing inventions in the three largest markets, Japan, the U.S. and Europe, has been more prevalent than in other technology sectors.
- Innovation within the computing industry is far more evenly distributed between countries than with other technologies.
- Of the top ten patent assignees based on innovations filed in the United States, Europe and Japan during 2007, most are from Japan.
- When we delve deeper into the technology produced by the top ten patentees, we find some interesting changes in the volumes between 2001 and 2007. Specifically, there has been a significant drop in innovation within the industrial and audio/visual and data recording sectors, as well as a dramatic fall in the semiconductors field which decreased by 26% between 2001 and 2007.



OBSERVATIONS

DIGITAL INVENTIONS ARE THE KEY TO TECHNOLOGY ADVANCES

Four areas of technology are truly exemplary in protecting high volumes of inventions. *Figure 1* demonstrates that following its role as the foundation of all consumer electronics, computing has consistently been the most prolific field when it comes to technology innovation. As telecommunications continues to entrench itself at the heart of both entertainment and business services technology, it is unsurprising that the telecommunications industry comes a close second in producing high volumes of patents worldwide.

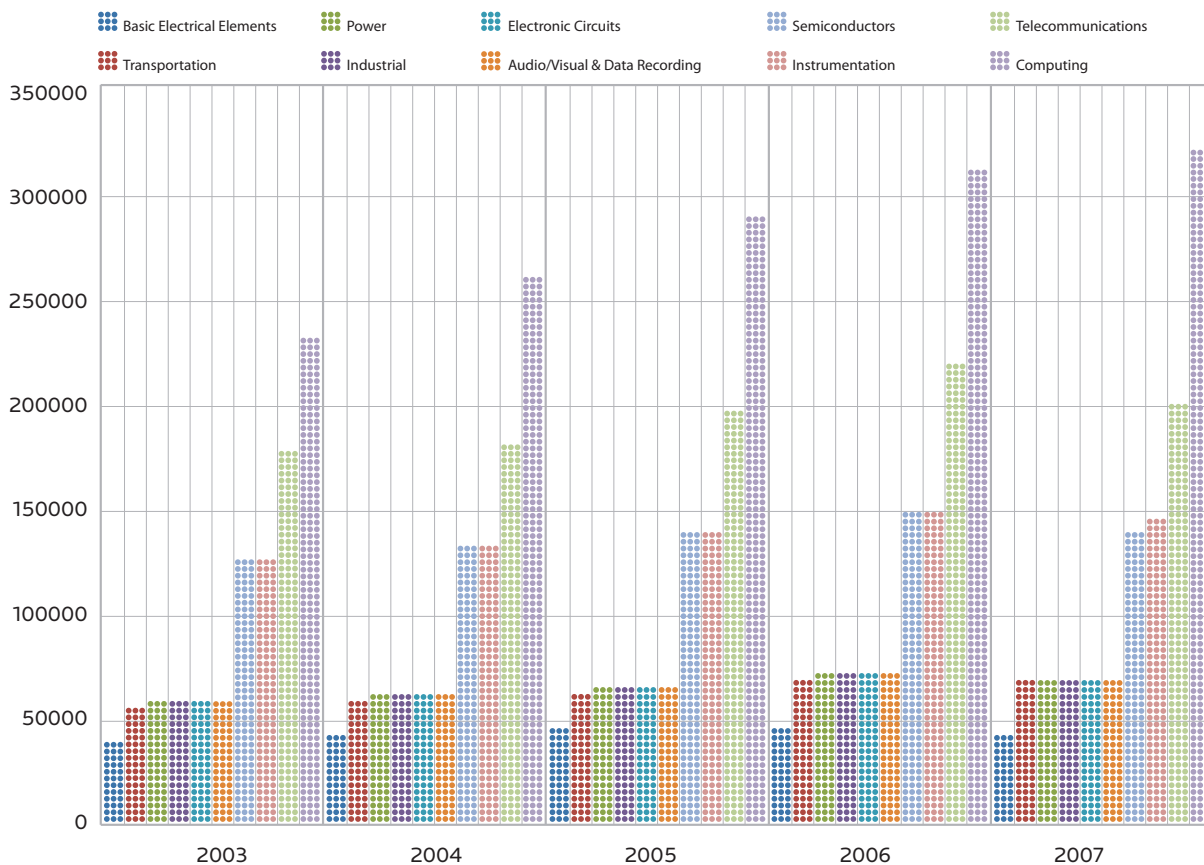


Figure 1

The instrumentation field is in third place, primarily because it has such extensive applications. The semiconductor field, which is the foundation of modern digital technology, is in fourth place – again due to the wide-ranging uses it provides.

OBSERVATIONS

COMPUTING TAKES PRECEDENCE WHEN TECHNOLOGY IS BEING PROTECTED

The 2007 innovations that were filed in Japan, United States and Europe are shown in figure 2. These originated in the G8 countries (Canada, France, Germany, Italy, Japan, Russia, the UK and the U.S.) as well as China and South Korea, and are separated by technology sector. The tri-lateral analysis below shows the location of assignees on patent applications filed in Europe, Japan and the U.S., and shows that China rarely publishes outside of its own country, in these specific technologies.

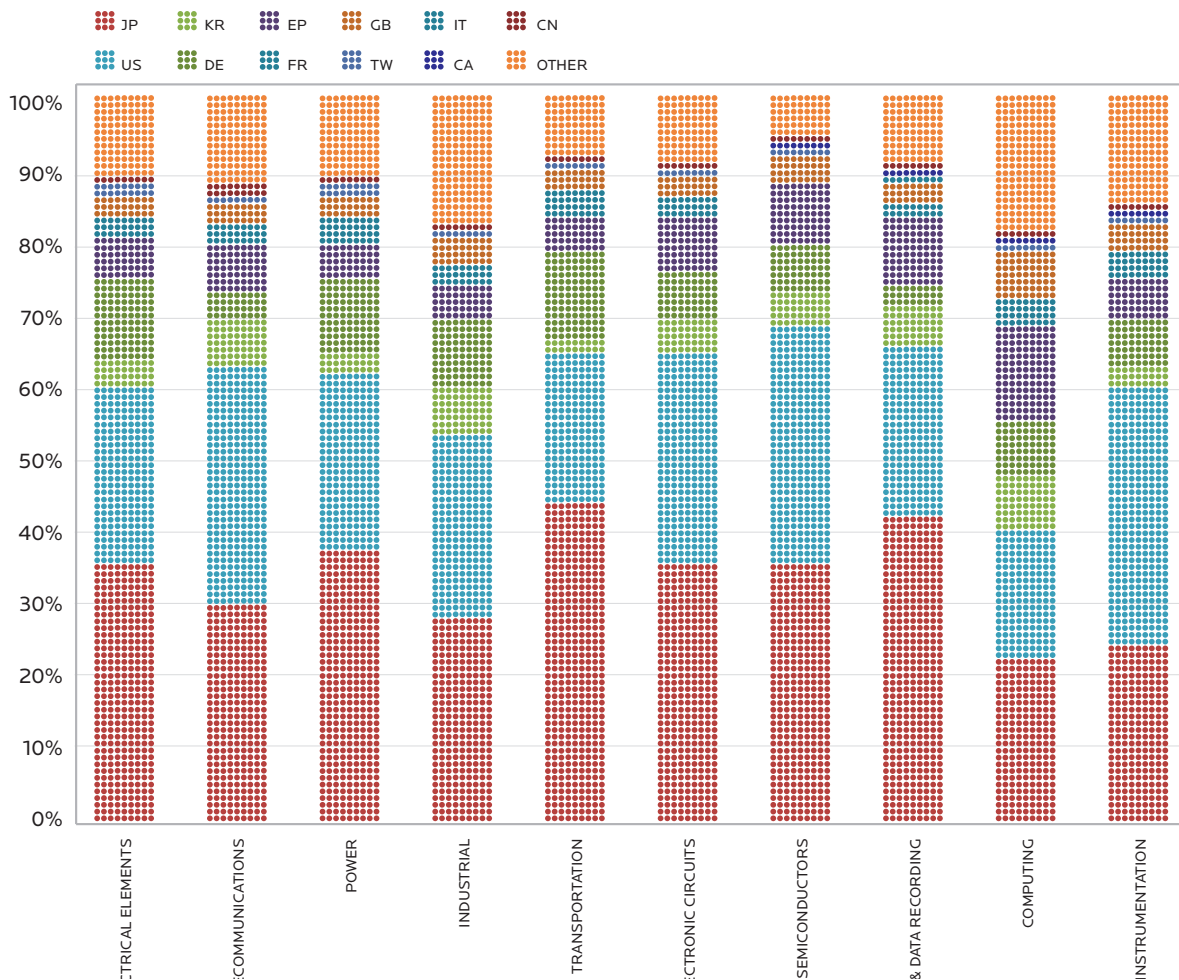


Figure 2

It's also interesting to note that the computing industry is far more evenly distributed between the countries than with other technologies. Here, Japan and the U.S. comprise only about 40%, whereas in other disciplines these two countries normally hold about 60% of the global patenting. This shows that generally patenting organizations feel that protecting computing inventions in the three largest markets, Japan, the U.S. and Europe, is much more important for innovation within computing than in other technology sectors.

OBSERVATIONS

DUTCH TAKE THE TOP SPOT WHEN WE RANK THE WORLD'S LEADING PATENT ASSIGNEES

Figure 3 illustrates the top ten patent assignees based on innovations filed in the United States, Europe and Japan during 2007. Four of the top ten patentees are from Japan, with representatives from South Korea, Netherlands, Germany and the U.S.. In first place is Dutch corporation Konink Philips Electronics followed by Matsushita Electric Industries from Japan. Sony (Japan), Samsung (Korea), Canon (Japan), General Electric (US), 3M (US), Bayer (Germany), Hitachi (Japan) and Siemens (Germany) complete the table.

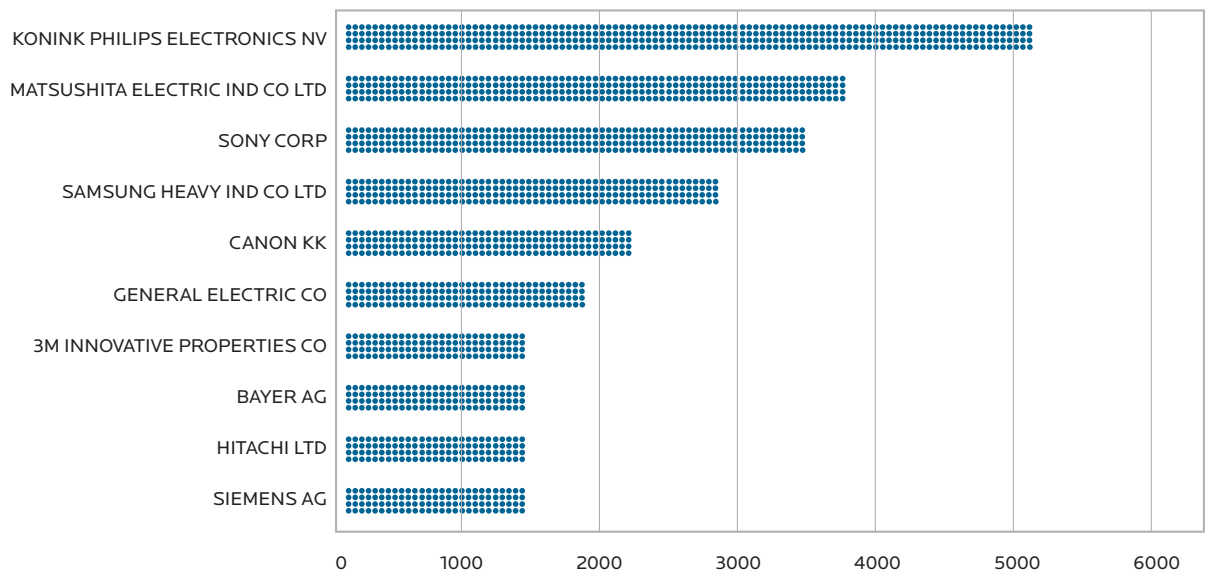


Figure 3

As demonstrated above, the top ten is dominated by companies that operate primarily in the electronics industry, with only 3M and Bayer representing the chemical/pharmaceutical industries. In figure 4 we focused on the top ten companies from the world of consumer electronics, which now includes Fujitsu (Japan) and Robert Bosch (Germany). We can see that half of the top ten electronics manufacturers are from Japan. When we examine the volumes of the different technology sectors in 2007, we find that invariably they have R&D interests in many different technical fields. Those that stand out are Matsushita Electric Industries and Samsung who both have relatively high output in each technology field.

	Instrumentation	Computing	Audio/Visual and Data Recording	Industrial	Transportation	Semiconductors	Electronic Circuits	Basic Electrical Elements	Power	Telecommunications
BOSCH GMBH ROBERT	1345	951	144	561	3112	298	498	212	860	599
CANON KK	11400	3042	1750	567	255	678	54	223	4854	1456
FUJITSU LTD	888	4662	1257	188	289	2641	1536	220	278	3143
GENERAL ELECTRIC CO	1922	1282	158	333	352	311	330	258	520	283
HITACHI LTD	1602	4070	1275	729	1492	1633	944	240	1225	1655
KONINK PHILIPS ELECTRONICS NV	2043	4007	2673	324	352	1783	1386	1028	384	3180
MATSUSHITA ELECTRIC IND CO LTD	3232	6025	4558	3791	1474	4183	3823	1473	2899	6625
SAMSUNG HEAVY IND CO LTD	3411	7819	3185	1473	270	11058	3465	928	1741	8334
SIEMENS AG	2755	3118	452	756	1893	845	1147	530	1862	2589
SONY CORP	6004	5497	2372	1144	170	1627	263	740	4716	404

Figure 4

OBSERVATIONS

DYNAMIC INNOVATION: HITACHI REALIGNS ITS R&D

When we delve deeper into the technology produced by the top ten patentees, we find some interesting changes in the volumes between 2001 and 2007. The most striking example is that of Hitachi and this is highlighted in *Figure 5*. Despite having a high output across the board as previously mentioned, we see that the volumes published have decreased in half of the technology sectors. There has been a significant drop in innovation within the industrial and audio/visual and data recording sectors. Additionally there was a dramatic fall in the semiconductors field which decreased by 26% between 2001 and 2007.

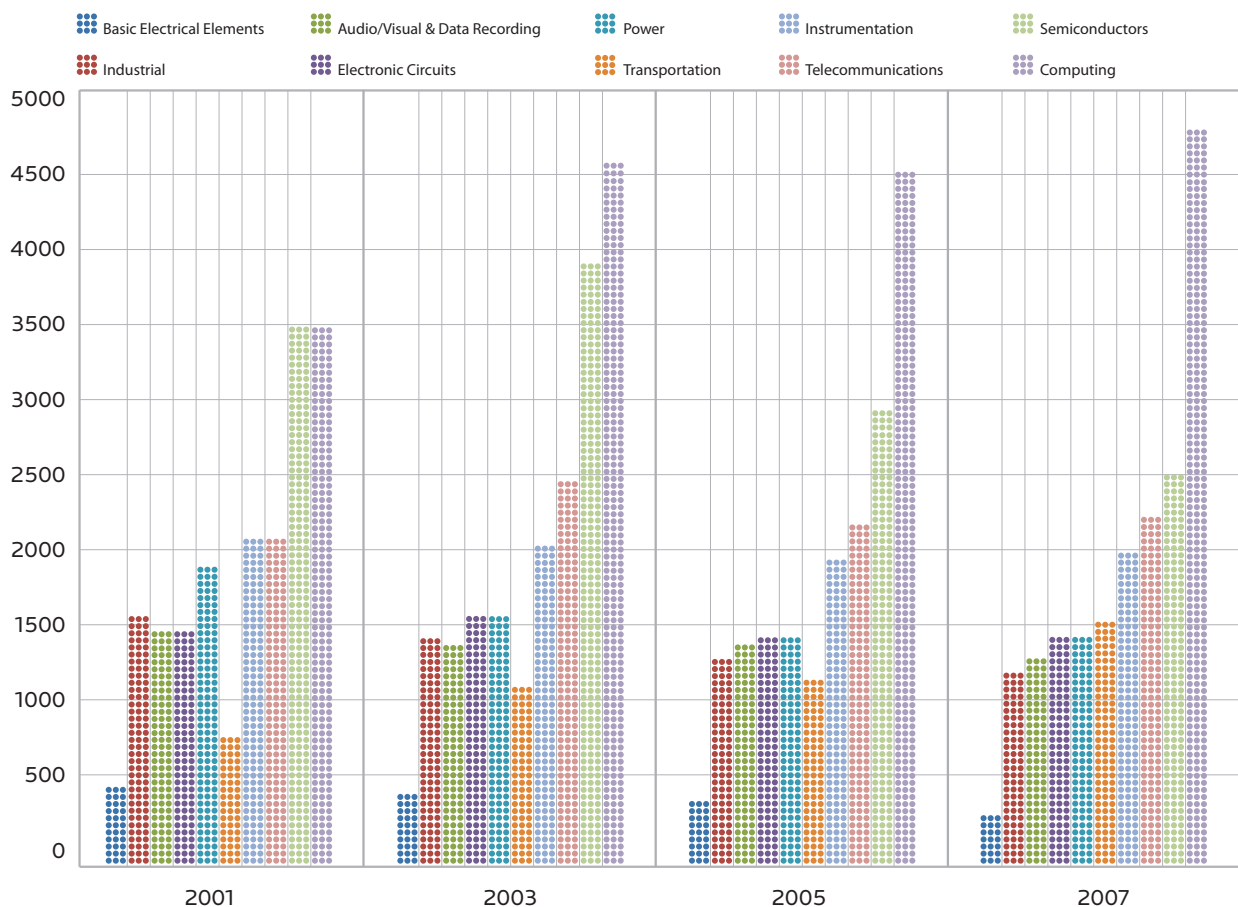


Figure 5

However, these shrinkages are nearly balanced by an increase in the other sectors, meaning the total volumes per year are relatively unchanged. This is most impressively exemplified in the transportation sector, where Hitachi has increased innovation by 78%. This may show that Hitachi has in fact realigned its R&D focus.



CONCLUSION

Thomson Innovation analysis shows how innovation in computing is dominating the technology landscape today. Japan continues to lead, holding the majority share of tri-lateral inventions across almost of the technologies we have analyzed, and its companies are practically unrivalled in terms of patent assignments. With consumer demand increasing steadily for ever more complex consumer electronics, it would appear that patenting activity around computing can only continue to grow.

METHODOLOGY

All Electronic Patent Index (EPI) records within *Derwent World Patent Index*® (DWPI), from 2001 to 2007, were analyzed, using *Thomson Innovation*. Inventions were grouped into technology areas based on Derwent Classes and tri-lateral analysis was derived through the searching of all inventions that have been filed in Japan, the U.S. and Europe in 2007.

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Eoin Bedford

Scientific

Thomson Reuters

+44 207 433 4691

eoin.bedford@thomsonreuters.com

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