



IP as a Catalyst for Scalability: Protect, Leverage, and Monetize

4th July 2025

The Key Discussion Aspects

- Understand the *role of IP* in business growth, competitiveness, and profitability.
- Identify and mitigate key *IP risks* that hinder scalability and expansion.
- Explore *IP commercialization strategies* to enhance valuation and attract investors.
- Learn actionable steps for *integrating IP into business* models for long-term success.

Scalability Starts with Ownership and Protection



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CREATE – OWN – PROTECT – SHARE – COLLABORATE – REINVENT

What Economy are we in?



Agriculture → Manufacturing → Digital

We are in the ideas economy.
The economy of intangibles

Rules are being re-written in almost every industry



- World's largest taxi company **owns no taxis**
- Largest accommodation provider **owns no real estate**
- Largest phone companies **owns no telco infrastructure**
- World's most valuable retailer **has no inventory**
- Most popular media owner **creates no content**
- World's largest movie house **owns no cinemas**
- Largest software vendors **don't write the apps**

Strong IPs Create Price Premium & Shareholders Value



\$12.50



\$45

Equity and scaling is an end-to-end perception



\$5



\$50



\$500



\$5,000

*Now which box would *you* choose?*

Let's Re-define IP Context?

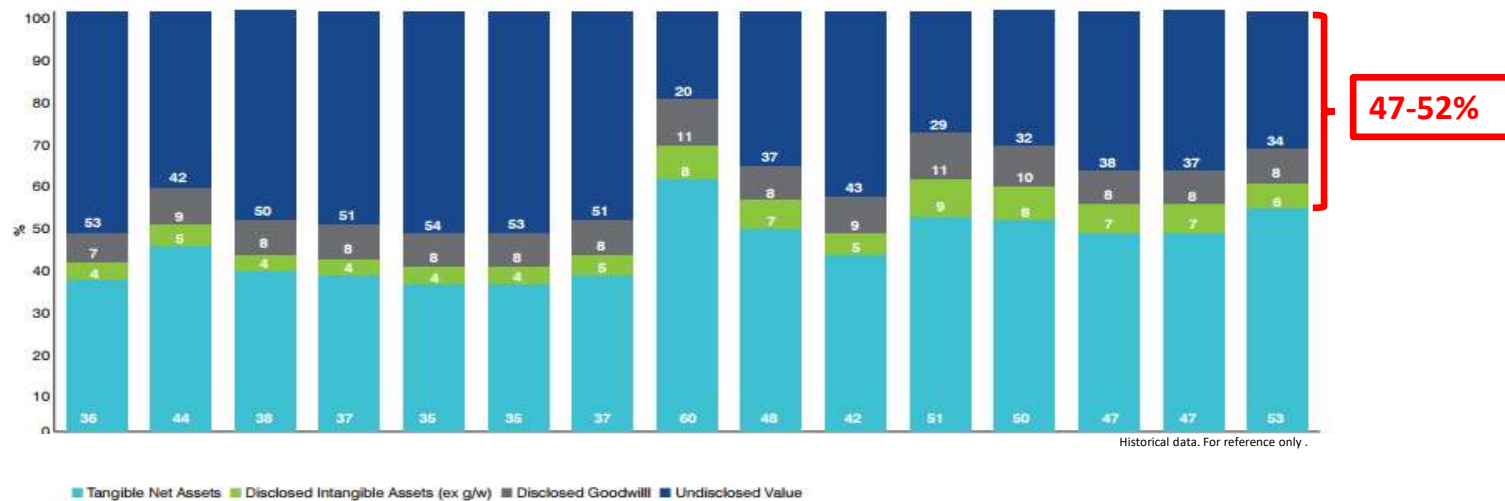


IP = Intangible Property?

IP = Intangible Assets?

The Values of Intangibles (or IP)

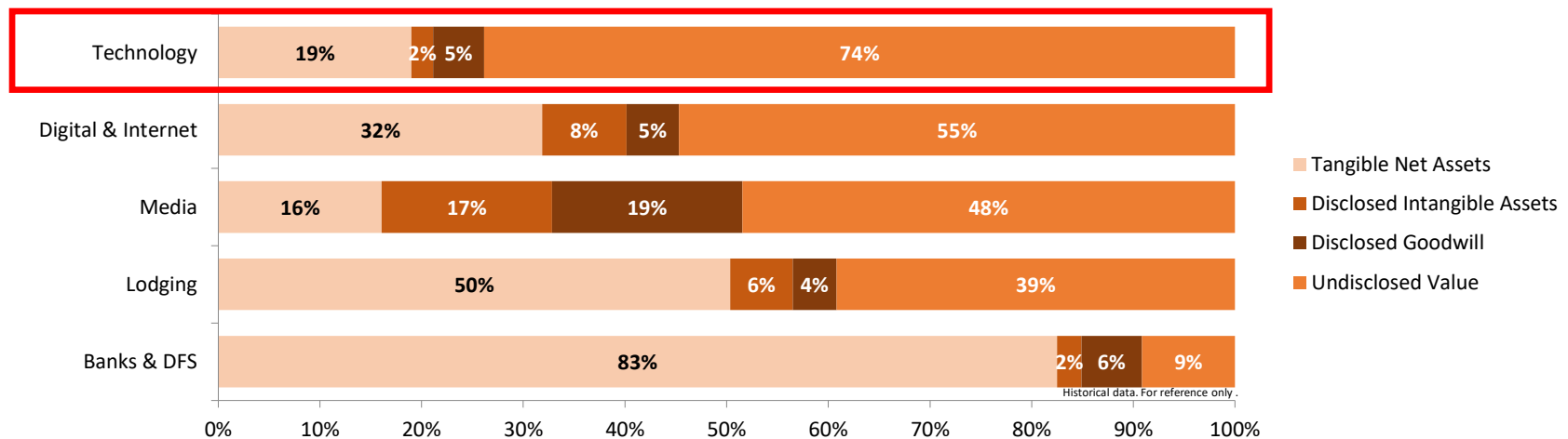
Global Enterprise Value Breakdown (%)



- Over 70 trillion of Enterprise Value are tangible assets.
- Over 47% of global enterprise value is intangible.

A sector example

Sectors by Enterprise Value (%)





Warren Buffett, CEO

BERKSHIRE HATHAWAY INC.

“

I can make a whole lot more money
skillfully managing intangible assets
than managing tangible assets.

”

Intangible or IP Assets?

IFRS Intangible Asset Classes



The BRAND is the most powerful
intangible for creating
shareholder and business value.

It's also under maximum threat in the 21st Century.

You are an SME with a Statistical Relevance



70% SME's fail in the first 3 years.

Global or ?

If you are on the web in any form, you
are global from day 1.

Your Key Questions?



- What Product are you selling?
- What Business are you into?
- Who is your competitor?

What is scale?



- Acceptance of POC?
 - Partnership contracts?
 - Number of customers?
 - Revenue Growth?
 - Market Presence?
-
- Continues improvement?
 - Expansion of applications?
 - Licensing?
 - Residual Value Creation?



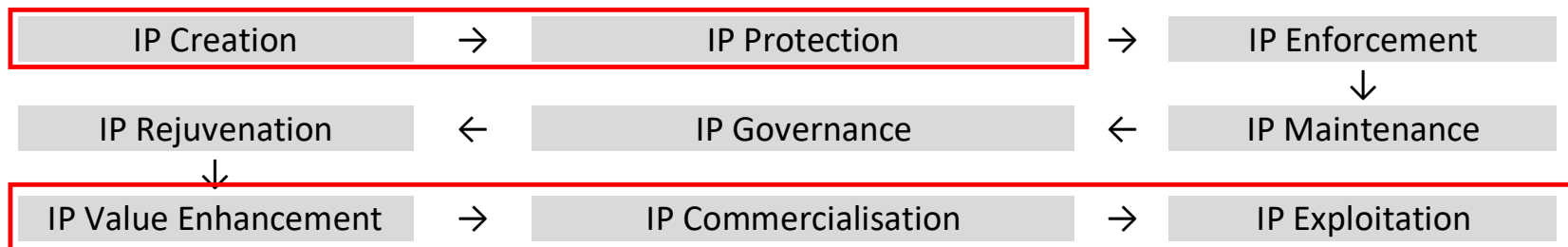
Why IP Matters?

IP Ecosystem and Related Challenges

IP ecosystem is typically made up of the following

Typically high involvement and large supporting infrastructure. Once created protected, relatively low risk.

But does this help you scale and make money?



Typically low involvement and smaller supporting infrastructure.

IP if not exploited for monetisation, growth and scalability, ITS MONEY LEFT ON THE TABLE.

Why IP Matters for Startups Scalability



- Protection against imitation, copycats and market dilution.
- Strengthening investor confidence and funding opportunities.
- Establishing long-term brand differentiation.

Types of IP & Their Business Implications



- **Trademarks:** Brand recognition and customer trust.
- **Patents:** Exclusive rights to innovations and technology.
- **Copyrights:** Content and software protection.
- **Trade secrets:** Competitive advantage through confidential business

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Common IP Challenges & Pitfalls During Scaling



- Delayed IP filing resulting in loss of rights.
- Inadvertently infringing on existing IP.
- Or intentionally Infringing.
- Insufficient due diligence when expanding into new markets.

The curious case of Luckin Coffee



March 11 -- Luckin Coffee has won its trademark infringement case against Thailand's Royal 50R Group, in a landmark ruling that is a rare example of a large amount of compensation being awarded in a Thai copyright dispute and which will help advance the Chinese coffee chain's efforts to expand internationally.

Managing and Mitigating IP Risks in Business Growth



- **IP Risks that Can Hinder Growth**

- ◆ Trademark infringement lawsuits causing brand damage.
- ◆ Patent trolls blocking product launches.
- ◆ Weak IP policies resulting in lost business opportunities.

- **Proactive IP Strategies for Scaling Businesses**

- ◆ Conducting IP audits before funding rounds.
- ◆ Securing global trademarks and patents early.
- ◆ Implementing non-disclosure agreements (NDAs) with partners.

- **Legal and Compliance Considerations**

- ◆ Cross-border IP protection strategies in ASEAN.
- ◆ Licensing agreements to avoid IP disputes.
- ◆ Leveraging government-backed IP programs.

Actionable IP Roadmap for Scaleups



● Building an IP-Driven Business Model

- ◆ Structuring IP ownership within the entities?
- ◆ Aligning IP with product and market strategy?
- ◆ Creating IP value in mergers and acquisitions?

● Steps to Strengthen Your IP Portfolio

- ◆ Conducting an IP audit and securing key assets.
- ◆ Developing an international filing strategy.
- ◆ Implementing IP enforcement mechanisms.

IP Negligence Comprises Growth



Compromised Growth:

- **Snapchat vs. Facebook** – Weak early patents led to feature replication by competitors.
- **Uber in China** – IP disputes hindered its growth, leading to a forced merger with Didi.
- **Samsung vs. Apple** – Costly lawsuits impacting product strategy.
- **Alibaba's Counterfeiting Issues** – Weak IP policies affected investor confidence.
- **Zoom's Trademark Disputes** – Early trademark lapses led to legal battles.

Led to Decline /Shutdown:

- **Napster** – Copyright infringement lawsuit shut down operations.
- **Theranos** – Mismanagement and misrepresentation of IP and trade secrets led to collapse.
- **BlackBerry** – Weak patent monetization led to decline.
- **Kodak** – Failure to leverage IP in the digital transition.
- **Yahoo!** – Lost IP assets through poor strategic decisions.

Current Business Structure (Issues)



- IP embedded within OpCo → exposure to operational risk.
- No royalty income or IP monetization.
- Diluted valuation due to lack of IP segregation.

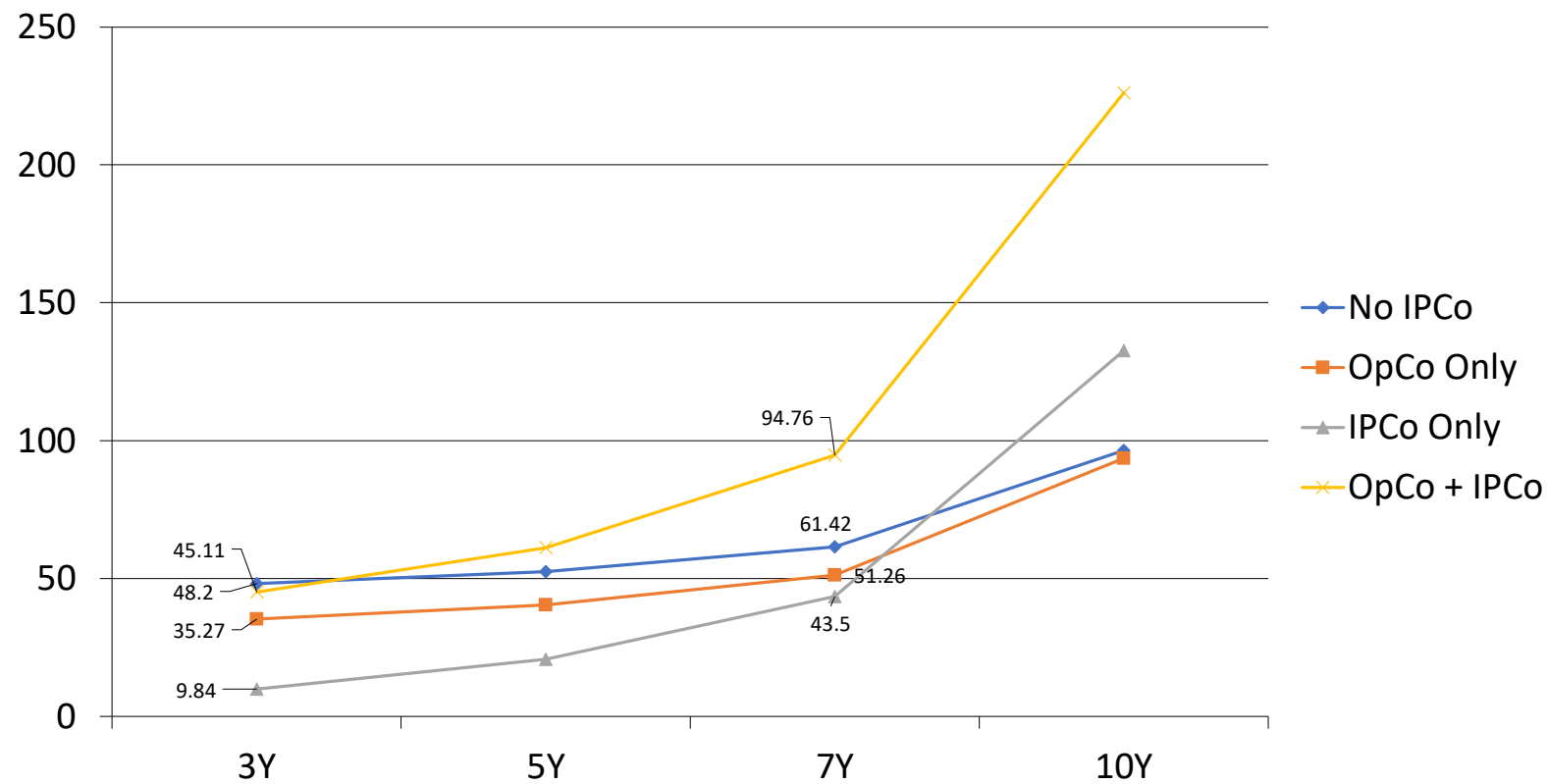
Strategic Rationale, Valuation Impact, and Investor Messaging



- IPCo creates recurring, high-margin income via royalty + licensing.
- Unlocks IP value, enhance margins, and optimize tax globally.
- Supports global franchising and financial performance.
- Enhances enterprise value by 50%+ through structured IP monetization.
- Protects IP from operational risk — de-risks investor exposure.
- Positions Varco as a scalable, asset-light, IP-led platform.
- Boosts attractiveness to FMCG, pharma, and PE buyers.
- Facilitates dual-path exits: Sell brand (OpCo) or IP portfolio (IPCo).

Size of the Prize – IPCo Valuation Comparison

Valuation Trajectory: No IPCo vs. OpCo vs. IPCo vs. Combined





Samir Dixit
Global Head

Samir is an award-winning strategy and transformation person with over three decades of strategy, business growth and brand building experience across B2B and B2C businesses. He has been guiding company boards, C-suite and governments on business growth, marketing and brand strategies across Asia. He has worked across business consulting, IP management, and valuations (Brand Finance), client side (Standard Chartered, LG) and multiple agencies (Ogilvy, Publicis, Bates), He knows and understands what it takes to build a brand, being competitive, drive business growth, manage acceleration through transformation, and most of all profits.



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