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Service Level Document

What the service is

Orbis Intellectual Property (Orbis IP) is a one-stop resource that combines company and intellectual property information to support research and strategic decision-making. The platform offers a highly searchable database containing 178 million patents from 163 countries and 190 million trademarks from 203 countries, linking both private and public holding companies and corporate groups. Orbis IP also provides access to 80 million patent valuations, 24 million patent transactions, and 275,000 litigation records, delivering valuable insights into patent and innovation strategies across market sectors and regions. Data is delivered through a contemporary interface with advanced search, filtering, and visualization capabilities. Users can access the platform via secure login, with 99.5% service availability, and benefit from robust export and integration options for further analysis and reporting. This enables users to benchmark innovative companies, identify technology trends, and interpret research using advanced data visualization tools.

Monitoring capability

Orbis IP enables users to proactively monitor intellectual property assets and corporate activity worldwide. The platform covers 178 million patents linked to over 2.4 million companies and 190 million trademarks linked to over 16 million companies. Users can track new patent filings, trademark registrations, global transactions, and litigation events. Ownership structures, including private and public micro-level company records, are monitored to uncover hidden portfolios and group innovation activity. Orbis IP provides annual monetary valuations for over 82 million patents and qualitative valuations for company portfolios. The platform includes global transactions and litigation records, full patent text search, and standardized classifications (IPC, CPC, USPC, WIPO). Company records are tagged with NAICS, NACE, and US SIC codes. These capabilities help organizations identify trends, benchmark performance, and respond quickly to changes in the IP landscape.

Analytical Tools

Orbis IP offers a comprehensive suite of analytical tools for in-depth intellectual property analysis. Users can perform keyword searches across full patent texts and analyze patent portfolios using annual monetary and qualitative valuations. The platform enables benchmarking of innovative companies by industry sector, region, or country, and supports technology landscape and whitespace analyses to identify patent trends and leading innovators. Compatible with FDI, ODI, and emerging technology research, Orbis IP helps uncover patent portfolios owned by subsidiaries within corporate groups. Advanced data visualization tools allow instant interpretation of research. Users can analyze royalty and

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licensing agreements, understand company and shareholder ownership, and track innovation patterns using acquisitions and M&A data. These tools support benchmarking across industries, companies, and regions, empowering strategic research and decision-making.

Export Functionality

Orbis IP offers robust export functionalities to support further analysis and reporting. Users can export data and analytical results in various formats suitable for integration with other systems or for offline review. The platform's export options are designed to accommodate the needs of researchers, analysts, and decision-makers, ensuring that insights derived from Orbis IP can be easily shared and incorporated into broader workflows.

Additional modules:

- **Patent and Trademark Valuations:** Annual monetary valuations are available for over 82 million patents, along with annual qualitative assessments of company patent portfolios.
- **Global Transactions Data**: Access comprehensive data on global transactions involving both patents and trademarks, enabling analysis of acquisition, licensing, and transfer activity.
- **Litigation Records:** The platform includes global litigation records linked to both companies and patents, supporting risk assessment and legal research.
- **Ownership Structures:** Detailed ownership structures are provided for both private and public companies, allowing users to uncover patent portfolios owned by subsidiaries within a corporate group.
- **Royalty and Licensing Agreements:** Analyze royalty and licensing agreements linked to patents to understand commercialization and revenue streams.
- **Data Visualization Tools:** Advanced visualization tools help interpret research findings, benchmark innovators, and identify technology trends across sectors and regions.

The levels of data backup and restore, and disaster recovery you'll provide, such as business continuity and disaster recovery plans

Moody's is committed to being prepared to quickly recover and resume operations in the event of a significant business interruption.
Resilience and Disaster Recovery Planning is in place to ensure the technology and systems to support the recovery processes for critical business functions. There is a disaster recovery team in place that is responsible for mobilizing and managing the recovery process. The ensure disaster recovery procedures are rehearsed and tested.

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Moody's has identified the applications that are critical to our business. These applications are implemented in separate production and recovery data centers using industry-standard practices to switch data from the production site to the recovery site without loss of data and minimum downtime. This will be reviewed as part of the Business Continuity Plan. Disaster Recovery Planning activities are not limited to recovery but ensure that production environments are designed from a technology and systems perspective to support the recovery processes for critical business functions, this may include using redundant processing capacity at other locations. Other activities include:

→ Providing remote-access facilities so that key employees can work from home or from non-office locations in the event their primary workplace was disrupted or made inaccessible.

→ Contracting with reputable technology firms specializing in rapid restoration of telecommunications systems, and recovery of software and data assets.

→ Obtaining contractual assurances from certain key vendors that they have business continuity plans.

Being part of a top-tier financial services and information provider, we take our commitment to our clients very seriously. We continue to seek ways to improve our preparedness as we recognize new methods to manage business disruption risks, and to coordinate recovery efforts throughout the firm.
If you have further questions regarding Moody's efforts in this area, please contact help@moodys.com.

Onboarding and implementation

Moody's structured implementation approach ensures that our projects are aligned with our customers' business strategy so they can quickly achieve all benefits of the Moody's Solution.
Each customer will have a dedicated team that will cover the following aspects: front line support (helpdesk), training, and commercial account management. Each one of these roles provides a key element, and together we will ensure the customer has the best support possible.

Moody's support team will always try to help our customers get the most out of the solution they have purchased. Throughout the contract length, our teams of account managers and helpdesk support will help identify more within the solution and share new ways to utilize the database.

Access to the system is controlled by usernames and passwords. This is controlled by our back-end administration site, and the users will be sent an email directly containing their login details. Users can be deleted and added on the administration site and passwords can be updated/reset. Anyone who does not have a username/password will not be able to access the system.

The admin site can be accessed and controlled by the client and/or Moody's.

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Within the admin site it is also possible to monitor usage statistics e.g. how frequently users are logging in to the system, how much data they are accessing.
Users will access Orbis IP via a URL which will take them to a user interface, each individual user will log into using their unique email and password. Through this interface, users will have access to all functionalities including search criteria, individual company reports, and the tools section which they will be able to access quickly and easily. Availability of service is 99.00%.

After sales support

1. Support and training will be provided by a designated account manager. The account manager will be on-hand to answer any questions around access/use of the Orbis IP interface, if there are any more technical data questions that the account manager is unable to answer, they will involve the help desk/product specialists.

2. You will also have access to the help desk for any questions they may have. This team can be reached at help@moodys.com. Email support is available 24/7. Phone support is available 8:30am – 6pm UK hours.

3. There are further resources available within Orbis IP itself such as walk-through guides and a comprehensive help section. Technical requirements Moody's platforms will work with Internet Explorer (IE10 upwards), Microsoft Edge, Google Chrome and Firefox.

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For more information visit moodys.com/publicsector