

# LiDAR for Automotive 2025

## Patent Landscape Analysis – December 2025

*The global IP battlefield is heating up: who are the key players, and which technologies will shape the future of LiDAR for automotive?*



### REPORT OVERVIEW

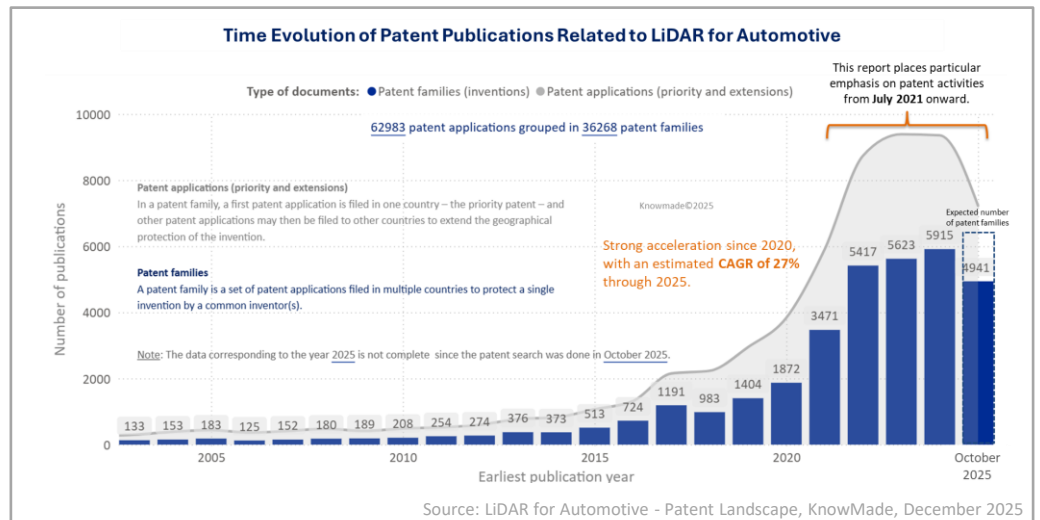
- Topic:** LiDAR for Automotive
- Type:** Patent Landscape Analysis
- Publication:** December 2025
- Reference:** KM25004
- Deliverables**
  - Report (>160 slides)
  - Database (>36,200 patent families)
  - Interactive dashboard (optional)
- Pricing**
  - €4,990 - Report+Database
  - €7,990 - Report+Database+Dashboard

### KEY FEATURES

- **Global patenting trends**, including time evolution of patent publications, countries of patent filings, etc.
- **Main patent assignees and IP newcomers** in the different segments.
- **Key players' IP position** and the relative **strength** of their patent portfolio.
- **IP leadership evolution** of patent assignees 2021 vs 2025
- **IP ecosystems** including co-owned patents including group-internal and external collaboration, etc.
- Patents categorized by **18 technological segments** (ToF, FMCW, phase-shift, MEMS, hybrid, OPA, flash, metasurface, LiDAR-On-Chip, 1550 nm, VCSEL, SPAD/SiPM, APD, packaging, calibration, Anti-interference, AI, fusion)
- **IP profile of 30 key players** (portfolio overview, tech coverage, geo coverage, notable patents, etc.)
- **Excel database** with all patents analyzed in the report, including **patent segmentations** and hyperlinks to an **updated online database**.
- **Interactive dashboard** enabling dynamic exploration of the patent landscape, allowing users to instantly drill down into key insights and tailor the analysis to their specific needs.

### A Rapidly Expanding Global LiDAR IP Landscape

With centimeter-level accuracy and consistent performance across varied lighting conditions, LiDAR is becoming a core sensing modality for ADAS, L2-L4 autonomous driving, robotaxis and a growing range of robotics and infrastructure applications. Its rapidly expanding patent activity reflects this shift, marking LiDAR's transition from an experimental technology to a primary perception sensor in one of the most competitive IP landscapes in advanced mobility. As of October 2025, the **global LiDAR patent landscape for automotive applications** includes more than **36,200 patent families** and over **62,900 individual patents**, with strong growth across FMCW LiDAR, solid-state architectures, photonic integration, advanced beam steering and AI-driven perception. Over 24,300 patent families were filed since July 2021 alone, tripling KnowMade's previous dataset and signalling the move from early research to full-scale industrialization. Between 2020 and 2025, LiDAR-related patenting increased at an estimated **CAGR of 27%**, highlighting the explosive pace of innovation across the sector.



### Global IP Trends and Strategic Players

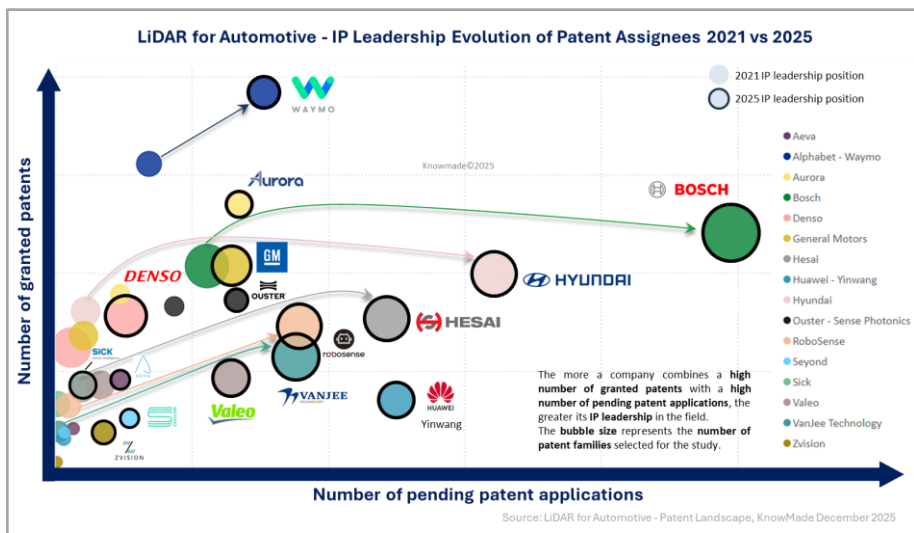
A major structural shift in the LiDAR patent landscape is the rapid and sustained rise of **China** as the world's largest source of LiDAR-related intellectual property. By 2025, China accounts for around **40% of global LiDAR patent publications**, surpassing the **United States** in both volume and growth rate. This trend is accompanied by a broad diversification of contributors, including LiDAR pure players, Tier-1 suppliers, automotive OEMs, autonomous-driving developers, semiconductor companies and research institutes. Their collective IP activity reflects the growing maturity of LiDAR technologies and the increasingly strategic alignment between patent portfolios and long-term technology roadmaps.

Chinese companies such as **Hesai, RoboSense, Huawei Yinwang, VanJee, Zvision, Benewake** and **Leishen Intelligent** are active across all major LiDAR technology domains and demonstrate significant momentum from 2021 to 2025. In parallel, the **United States** maintains a central role driven by **General Motors, Alphabet-Waymo, Aurora, Ouster, Seyond** and **Aeva**, while **Europe** contributes substantial activity through its automotive and photonics sectors, led by **Bosch, Continental, Valeo** and several OEMs focusing on components, packaging, calibration and vehicle-grade LiDAR integration. **Japan** and **South Korea** remain steady contributors through **Sony, Denso, Toyota, Samsung, Infoworks** and **Hyundai-Kia**, illustrating the global distribution of innovation efforts.

This geographic rebalancing highlights the shift from a historically U.S.- and Europe-led patent landscape toward one increasingly shaped by China's expanding photonics and semiconductor ecosystem.

### Evolution of IP Leadership 2021 vs 2025

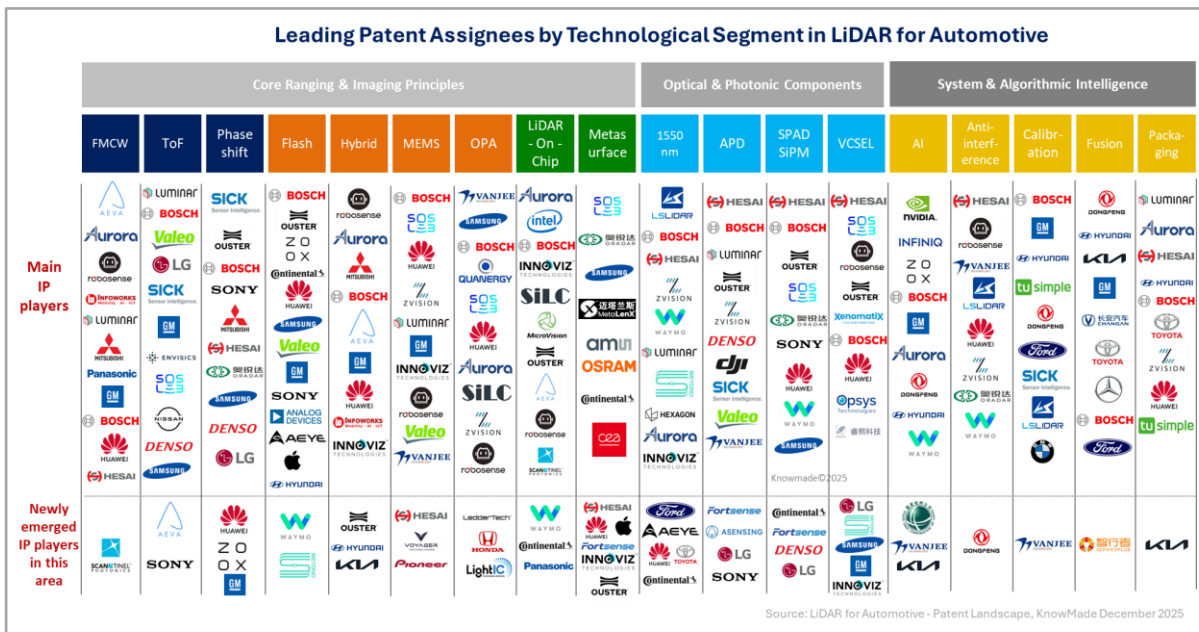
Between 2021 and 2025, LiDAR IP leadership evolved significantly as competition intensified across technologies, regions and industry segments. While the ecosystem is structured around four major categories: **LiDAR pure players**, **Tier-1 suppliers**, **car makers** and **autonomous-driving companies**, the report provides a deeper, fine-grained examination within each group, revealing how leadership positions, technology strengths and IP portfolios have shifted between 2021 and 2025 as competition intensified. In particular, LiDAR pure players show a clear acceleration in IP activity over the past few years, with many strengthening their portfolios at a pace unmatched in 2021. Detailed analysis reveals that although Tier-1 suppliers held more competitive and mature portfolios in 2021, the landscape has shifted: by 2025, multiple pure players demonstrate the scale, quality and technological depth required to position themselves as **emerging IP leaders** in several high-growth LiDAR domains. The report also identifies a growing cohort of **IP newcomers** including fast-moving pure players, autonomous-driving companies and car makers who's rapidly expanding portfolios signal their rising strategic influence. Together, these shifts illustrate how leadership is being redistributed across the LiDAR ecosystem, making this one of the most dynamic and contested IP environments in advanced sensing.



### Clear Segmentation of Innovation Across LiDAR Technologies

The report reveals strong innovation activity across all major LiDAR technology layers. Patents are concentrated in five key areas:

- **Core Ranging & Imaging Principles:** Pulsed ToF, FMCW and phase-shift ranging, along with MEMS, hybrid scanning, OPA and flash beam-steering architectures; advanced beam steering technologies as metasurface and nanophotonic approaches, as well as photonic-integrated LiDAR.



- **Optical & Photonic Components:** 1550 nm laser sources, VCSEL arrays, SPAD/SiPM detectors and APDs.
- **System & Algorithmic Intelligence:** Solid-state packaging, calibration, interference mitigation, AI and multi-sensor fusion.

In the present report, each segment is analyzed through a consistent framework that includes a segment definition, a patent portfolio overview, main assignees and representative notable patents.

### In-Depth IP Profiles Across Key Industry Segments

This report delivers a structured and data-driven IP profile analysis of **30 influential LiDAR patent assignees**, selected based on their IP leadership and recent activity from 2021 to 2025. The analysis covers the full spectrum of ecosystem actors, including **LiDAR pure players** (Hesai, RoboSense, Ouster/Sense Photonics, VanJee, Seyond, Zvision, Aeva, Leishen Intelligent, Sick, Benewake, SOSLAB, Oradar, Luminar, SiLC Technologies, Innoviz, MicroVision, Ibeo Automotive, Mobiltech, Infoworks, Blickfeld, OLEI, LiangDao, Aeye), **Tier-1 suppliers** (Bosch, Huawei-Yinwang, Valeo), **autonomous-driving companies** (Aurora, Alphabet-Waymo) and **car makers** (Hyundai, General Motors). For each company, the report provides a consistent assessment of IP leadership evolution, portfolio dynamics, geographic footprint, technical segmentation and recent patent activities.



### USEFUL PATENT DATABASE

This report includes an extensive **Excel database** with the 36,200+ patent families (inventions) analyzed in this study and a focus set of 24,300+ families added in the last four years, including:

- Key patent information (numbers, dates, assignees, titles, abstracts, etc.)
- Hyperlinks to an up-to-date online database (original documents, legal status, etc.)
- Structured classification by technological segments (ToF, FMCW, phase-shift, MEMS, hybrid, OPA, flash, metasurface, LiDAR-On-Chip, 1550 nm, VCSEL, SPAD/SiPM, APD, packaging, calibration, Anti- interference, AI, fusion)



### INTERACTIVE DASHBOARD (optional)

**Optional add-on:** One-year access to the interactive dashboard for unlimited authorized users within your organization.

This solution transforms the analysis into a true decision-support tool.

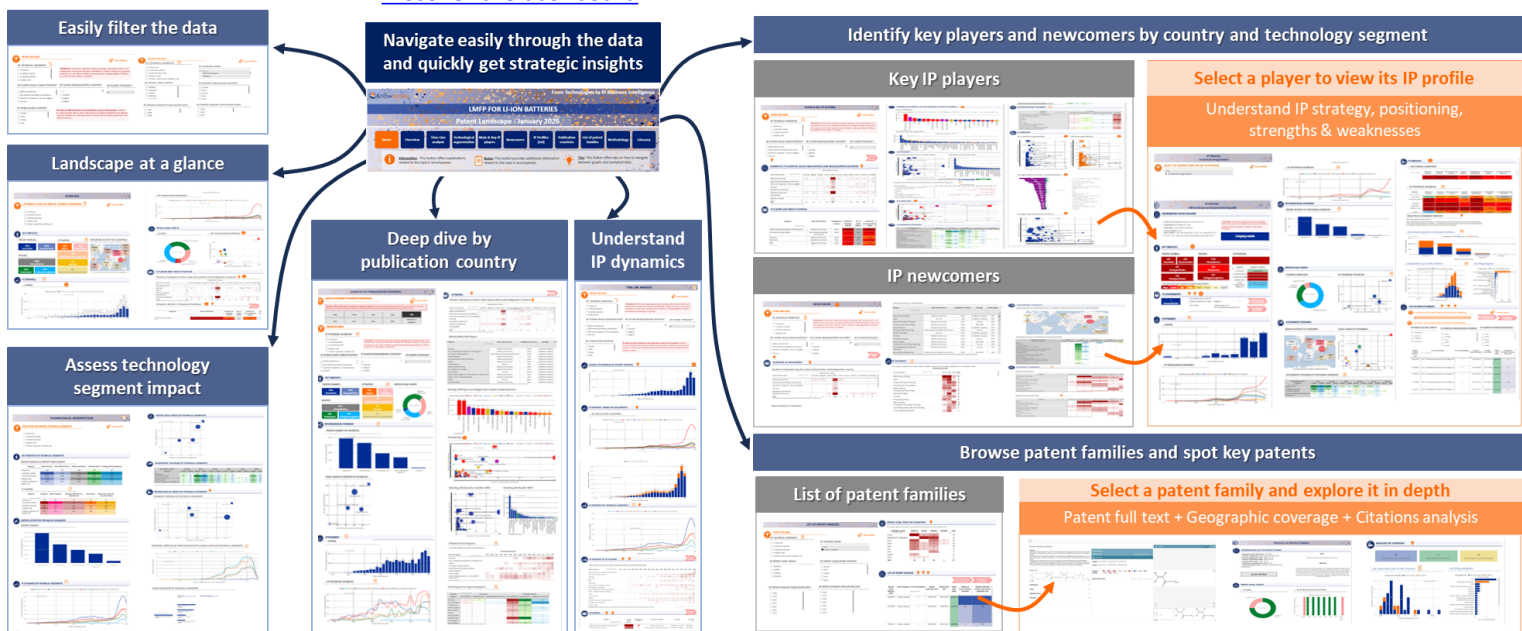
**Key features:**

- Dynamically explore the patent landscape based on your priorities
- Access clear, interactive visualizations for immediate insights
- Filter and analyze data by players, technologies, countries, dates, and legal status
- Drill down instantly from high-level trends to specific players, technologies, and patents
- Tailor insights to the needs of each team (R&D, IP, strategy, business development)

**Benefits:**

- Get immediate answers to your key questions
- Save time and accelerate decision-making
- Focus on the insights that matter most

Discover the dashboard



**Companies mentioned in the report (non-exhaustive)**

Bosch, VanJee Technology, Hesai, RoboSense, Huawei - Yinwang, Hyundai, Idriverplus, Kia, General Motors, Dongfeng Motor, State Grid Corporation of China, Alphabet - Waymo, LG, Zvision, Valeo, FAW Group, Sony, Samsung, Amazon - Zoox, Mercedes-Benz, Toyota, Ford, BMW, Aurora, ICAN Technology, Leishen Intelligent System, Volkswagen, Glas Trust, Benewake, Geely - Volvo Cars, Continental, Baidu - Apollo, Denso, Changan Automobile, NIO, Honda, Aeva, Mando, SOSLAB, Ouster - Sense Photonics, ZF, Motional, Seyond, Minth Group - Ningbo Xintai, China Southern Power Grid, Panasonic, Zhidao Network Technology, Qualcomm, Sick, Mobiltech, Aptiv, BYD, INFINIQ, ASENSING, DJI Technology, Innoviz, LiangDao, SiLC Technologies, Youdao Zhitu, Infoworks, TuSimple, Neolix, WeRide, CAIC, Intel, Jingwei HiraIn, Fortsense, GAC Group, Koito Manufacturing, Leike Zhitu, Shanghai Westwell Technology, KETI - Korea Electronics Technology Institute, Ningbo Sunny Automotive Optech, UISEE, Voyah Automobile Technology, Pioneer, Chery Automobile, Dspace - Digital Signal Processing & Control Engineering, Luminar, Nvidia (W/ Deepmap), Tanway, & E Hub Armenia, Hefei Jijia Guangda Technology, Pony.AI, Shenzhen Camsense Technologies, STMicroelectronics, DJI Technology, Mercedes-Benz, Momo Zhixing Technology, Zhejiang Huaray Technology, Changzhou Xingyu Automotive Lighting Systems, Cowa Technology, Elmos Semiconductor, and more.

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**ABOUT KNOWMADE**

**KnowMade** is a technology intelligence and IP strategy firm specializing in the analysis of patents and scientific publications. We assist innovative companies, investors, and research organizations in understanding the competitive landscape, anticipating technological trends, identifying opportunities and risks, improving their R&D, and shaping effective IP strategies.

**KnowMade's** analysts combine their strong technology expertise and in-depth knowledge of patents with powerful analytics tools and methodologies to transform patent and scientific data into actionable insights to support decision-making in R&D, innovation, investment, and intellectual property.

**KnowMade** has solid expertise in Semiconductors and Packaging, Power Electronics, Batteries and Energy Management, RF and Wireless Communications, Photonics, MEMS, Sensing and Imaging, Medical Devices, Biotechnology, Pharmaceuticals, and Agri-Food.

# ORDER FORM

## LiDAR for Automotive

Patent Landscape Analysis – December 2025

Ref.:KM25004

### SHIP TO

Name (Mr/Ms/Dr/Pr):

Job Title:

Company:

Address:

City:

State:

Postcode/Zip:

Country:

VAT ID Number for EU members:

Tel:

Email:

Date:

### PRODUCT ORDER

- REPORT + DATABASE <sup>(1)</sup>: **4,990 EUR**
- REPORT + DATABASE <sup>(1)</sup> + DASHBOARD<sup>(2)</sup>: **7,990 EUR**

For price in dollars, please use the day's exchange rate.  
For French customer, add 20% for VAT.  
The report (PDF), database (Excel), and access to the interactive online dashboard will be delivered electronically upon receipt of payment.

<sup>(1)</sup>Report & Database are provided under a **multi-user license and can be shared internally** among employees of the purchasing organization. Subsidiaries and joint ventures are excluded from this license. Please be aware that the report is watermarked on each page, with the name of the recipient and the organization (the name mentioned in the PO).

<sup>(2)</sup>Access to the interactive dashboard is granted for **one year (12 months) to an unlimited number of authorized users** within the purchasing organization. Access codes must not be shared with any third party. The dashboard must not be used to produce analyses or reports that are resold, sublicensed, or otherwise made available to any external user or entity outside the purchasing organization.

### PAYMENT METHODS

Order online: Click [here](#)

#### Check

To pay your invoice using a check, please mail your check to the following address:

KnowMade S.A.R.L.  
2405 route des Dolines, Le Drakkar  
06560 Valbonne Sophia Antipolis  
FRANCE

#### Money Transfer

To pay your invoice using a bank money wire transfer, please contact your bank to complete the process. Here is the information you will need to submit the payment:

Payee: KnowMade S.A.R.L.  
Bank: Banque Populaire Méditerranée, CAP 3000 Quartier du lac, 06700 St Laurent du Var  
IBAN: FR76 1460 7003 6360 6214 5695 139  
SWIFT: CCBPFRPPMAR

#### Paypal

To pay your invoice via PayPal, you must first register at [www.paypal.com](http://www.paypal.com). You can then send money to KnowMade S.A.R.L. by entering our email address [contact@knowmade.fr](mailto:contact@knowmade.fr) as the recipient and entering the invoice amount.

### RETURN ORDER BY

E-mail: [contact@knowmade.fr](mailto:contact@knowmade.fr)

Mail: KnowMade S.A.R.L. 2405 route des Dolines, Le Drakkar, 06560 Valbonne Sophia Antipolis, FRANCE

I hereby accept KnowMade's Terms and Conditions of Sale  
Signature:

# TERMS AND CONDITIONS OF SALES

## Definitions

“Acceptance”: Action by which the Buyer accepts the terms and conditions of sale in their entirety. It is done by signing the purchase order which mentions “I hereby accept KnowMade’s Terms and Conditions of Sale”.

“Buyer”: Any business user (i.e. any person acting in the course of its business activities, for its business needs) entering into the following general conditions to the exclusion of consumers acting in their personal interests.

“Contracting Parties” or “Parties”: The Seller on the one hand and the Buyer on the other hand.

“Intellectual Property Rights” (“IPR”) means any rights held by the Seller in its Products, including any patents, trademarks, registered models, designs, copyrights, inventions, commercial secrets and know-how, technical information, company or trading names and any other intellectual property rights or similar in any part of the world, notwithstanding the fact that they have been registered or not and including any pending registration of one of the above mentioned rights.

“License”: For the reports and databases, 2 different licenses are proposed. The buyer has to choose one license:

1. Single user license: a single individual at the company can use the report.

2. Multi user license: the report can be used by unlimited users within the company. Subsidiaries and Joint Ventures are not included.

“Products”: Reports are established in PowerPoint and delivered on a PDF format and the database may include Excel files.

“Seller”: Based in Sophia Antipolis (France headquarters), KnowMade is a technology intelligence company specialized in the research and analysis of scientific and technical information. We provide patent landscapes and scientific state of the art with high added value to businesses and research laboratories. Our intelligence digests play a key role to define your innovation and development strategy.

## 1. Scope

1.1 The Contracting Parties undertake to observe the following general conditions when agreed by the Buyer and the Seller. Any additional, different, or conflicting terms and conditions in any other documents issued by the buyer at any time are hereby objected to by the seller, shall be wholly inapplicable to any sale made hereunder and shall not be binding in any way on the seller.

1.2 This agreement becomes valid and enforceable between the Contracting Parties after clear and non-equivocal consent by any duly authorized person representing the Buyer. For these purposes, the Buyer accepts these conditions of sales when signing the purchase order which mentions “I hereby accept KnowMade’s Terms and Conditions of Sale”. This results in acceptance by the Buyer.

1.3 Orders are deemed to be accepted only upon written acceptance and confirmation by the Seller, within [7 days] from the date of order, to be sent either by email or to the Buyer’s address. In the absence of any confirmation in writing, orders shall be deemed to have been accepted.

## 2. Mailing of the Products

2.1 Products are sent by email to the Buyer:

- within [1] month from the order for Products already released; or

- within a reasonable time for Products ordered prior to their effective release. In this case, the Seller shall use its best endeavours to inform the Buyer of an indicative release date and the evolution of the work in progress.

2.2 Some weeks prior to the release date the Seller can propose a pre-release discount to the Buyer.

The Seller shall by no means be responsible for any delay in respect of article 2.2 above, and including in cases where a new event or access to new contradictory information would require for the analyst extra time to compute or compare the data in order to enable the Seller to deliver a high quality Products.

2.3 The mailing of the Product will occur only upon payment by the Buyer, in accordance with the conditions contained in article 3.

2.4 The mailing is operated through electronic means either by email via the sales department. If the Product’s electronic delivery format is defective, the Seller undertakes to replace it at no charge to the Buyer provided that it is informed of the defective formatting within 90 days from the date of the original download or receipt of the Product.

2.5 The person receiving the Products on behalf of the Buyer shall immediately verify the quality of the Products and their conformity to the order. Any claim for apparent defects or for

non-conformity shall be sent in writing to the Seller within 8 days of receipt of the Products. For this purpose, the Buyer agrees to produce sufficient evidence of such defects.

2.6 No return of Products shall be accepted without prior information to the Seller, even in case of delayed delivery. Any Product returned to the Seller without providing prior information to the Seller as required under article 2.5 shall remain at the Buyer’s risk.

## 3. Price, invoicing and payment

3.1 Prices are given in the orders corresponding to each Product sold on a unit basis or corresponding to annual subscriptions. They are expressed to be inclusive of all taxes. The prices may be reevaluated from time to time. The effective price is deemed to be the one applicable at the time of the order.

3.2 Payments due by the Buyer shall be sent by cheque payable to KnowMade, PayPal, or by electronic transfer to the following account:

Banque Populaire Méditerranée, CAP 3000 Quartier du lac, 06700 St Laurent du Var

BIC or SWIFT code: CCBFRPPMAR

IBAN: : FR76 1460 7003 6360 6214 5695 139

To ensure the payments, the Seller reserves the right to request down payments from the Buyer. In this case, the need of down payments will be mentioned on the order.

3.3 Payment is due by the Buyer to the Seller within 30 days from invoice date, except in the case of a particular written agreement. If the Buyer fails to pay within this time and fails to contact the Seller, the latter shall be entitled to invoice interest in arrears based on the annual rate Refi of the «BCE» + 7 points, in accordance with article L. 441-6 of the French Commercial Code. Our publications (report, database, tool...) are delivered only after reception of the payment.

3.4 In the event of termination of the contract, or of misconduct, during the contract, the Seller will have the right to invoice at the stage in progress, and to take legal action for damages.

## 4. Liabilities

4.1 The Buyer or any other individual or legal person acting on its behalf, being a business user buying the Products for its business activities, shall be solely responsible for choosing the Products and for the use and interpretations he makes of the documents it purchases, of the results he obtains, and of the advice and acts it deduces thereof.

4.2 The Seller shall only be liable for (i) direct and (ii) foreseeable pecuniary loss, caused by the Products or arising from a material breach of this agreement

4.3 In no event shall the Seller be liable for:

a) damages of any kind, including without limitation, incidental or consequential damages (including, but not limited to, damages for loss of profits, business interruption and loss of programs or information) arising out of the use of or inability to use the Seller’s website or the Products, or any information provided on the website, or in the Products;

b) any claim attributable to errors, omissions or other inaccuracies in the Product or interpretations thereof.

4.4 All the information contained in the Products has been obtained from sources believed to be reliable. The Seller does not warrant the accuracy, completeness adequacy or reliability of such information, which cannot be guaranteed to be free from errors.

4.5 All the Products that the Seller sells may, upon prior notice to the Buyer from time to time be modified by or substituted with similar Products meeting the needs of the Buyer. This modification shall not lead to the liability of the Seller, provided that the Seller ensures the substituted Product is similar to the Product initially ordered.

4.6 In the case where, after inspection, it is acknowledged that the Products contain defects, the Seller undertakes to replace the defective products as far as the supplies allow and without indemnities or compensation of any kind for labor costs, delays, loss caused or any other reason. The replacement is guaranteed for a maximum of two months starting from the delivery date. Any replacement is excluded for any event as set out in article 5 below.

4.7 The deadlines that the Seller is asked to state for the mailing of the Products are given for information only and are not guaranteed. If such deadlines are not met, it shall not lead to any damages or cancellation of the orders, except for non-acceptable delays exceeding [4] months from the stated deadline, without information from the Seller. In such case only, the Buyer shall be entitled to ask for a reimbursement of its first down payment to the exclusion of any further damages.

4.8 The Seller does not make any warranties, express or implied, including, without limitation, those of saleability and fitness for a particular purpose, with respect to the Products. Although the Seller shall take reasonable steps to screen Products for infection of viruses, worms, Trojan horses or other codes containing contaminating or destructive properties before making the Products available, the Seller cannot guarantee that any Product will be free from infection.

## 5. Force majeure

The Seller shall not be liable for any delay in performance directly or indirectly caused by or resulting from acts of nature, fire, flood, accident, riot, war, government intervention, embargoes, strikes, labor difficulties, equipment failure, late deliveries by suppliers or other difficulties which are beyond the control, and not the fault of the Seller.

## 6. Protection of the Seller’s IPR

6.1 All the IPR attached to the Products are and remain the property of the Seller and are protected under French and international copyright law and conventions.

6.2 The Buyer agreed not to disclose, copy, reproduce, redistribute, resell or publish the Product, or any part of it to any other party other than employees of its company. The Buyer shall have the right to use the Products solely for its own internal information purposes. In particular, the Buyer shall therefore not use the Product for purposes such as:

- Information storage and retrieval systems;
- Recordings and re-transmittals over any network (including any local area network);
- use in any timesharing, service bureau, bulletin board or similar arrangement or public display;
- Posting any Product to any other online service (including bulletin boards or the Internet);
- Licensing, leasing, selling, offering for sale or assigning the Product.

6.3 The Buyer shall be solely responsible towards the Seller of all infringements of this obligation, whether this infringement comes from its employees or any person to whom the Buyer has sent the Products and shall personally take care of any related proceedings, and the Buyer shall bear related financial consequences in their entirety.

6.4 The Buyer shall define within its company point of contact for the needs of the contract. This person will be the recipient of each new report in PDF format. This person shall also be responsible for respect of the copyrights and will guaranty that the Products are not disseminated out of the company.

## 7. Termination

7.1 If the Buyer cancels the order in whole or in part or postpones the date of mailing, the Buyer shall indemnify the Seller for the entire costs that have been incurred as at the date of notification by the Buyer of such delay or cancellation. This may also apply for any other direct or indirect consequential loss that may be borne by the Seller, following this decision.

7.2 In the event of breach by one Party under these conditions or the order, the non-breaching Party may send a notification to the other by recorded delivery letter upon which, after a period of thirty (30) days without solving the problem, the non-breaching Party shall be entitled to terminate all the pending orders, without being liable for any compensation.

## 8. Miscellaneous

All the provisions of these Terms and Conditions are for the benefit of the Seller itself, but also for its licensors, employees and agents. Each of them is entitled to assert and enforce those provisions against the Buyer.

Any notices under these Terms and Conditions shall be given in writing. They shall be effective upon receipt by the other Party.

The Seller may, from time to time, update these Terms and Conditions and the Buyer, is deemed to have accepted the latest version of these terms and conditions, provided they have been communicated to him in due time.

## 9. Governing law and jurisdiction

9.1 Any dispute arising out or linked to these Terms and Conditions or to any contract (orders) entered into in application of these Terms and Conditions shall be settled by the French Commercial Courts of Grasse, which shall have exclusive jurisdiction upon such issues.

9.2 French law shall govern the relation between the Buyer and the Seller, in accordance with these Terms and Conditions.