



Europäisches
Patentamt
European
Patent Office
Office européen
des brevets

Sharing patenting expertise and experiences

Training catalogue 2015 | **April update**



European Patent Academy

Foreword

With nearly 40 conferences, seminars, workshops and webinars, in 2015 the European Patent Academy will again be offering a wide-ranging training programme entirely tailored to the professional needs of your offices.

This overview presents events for offices in the member states in the usual compact and informative format, with a special mention for events that are also suitable for PATLIB centres.

The remarkable response we have received to our training programme for partner offices and organisations outside Europe has encouraged us to continue refining our programme.

Many of our seminars have been running for years, proof of their quality and the benefits they bring. Yet we also frequently introduce completely new formats, and after last year's successful debut there will be two slots for "Efficient dialogue between patent examiners and patent attorneys/applicants". The launch of our "IP Executive Summer Week" has been welcomed too, and this year it's our partner the OHIM's turn.

Our offerings for patent attorneys, judges, universities and small businesses are expanding, but we also take care to provide for substantive synergies between target audiences, a good example being the IP Teaching Kit - due to be completed module by module by the end of 2015 - because it can also be used for training in industry.

Since 2012, we have been offering preparatory training for the European qualifying examination (EQE) for candidates from countries with no more than five European patent attorneys. The Candidate Support Project is attracting growing numbers of participants from more and more countries.

Browsing through this catalogue you are sure to discover many other things for yourself.

Richard Flammer
Principal Director Patent Information - European Patent Academy

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Key EPO events

Search Matters

Reference BC01-2015
5-6 March 2015
Munich, Germany

Content

- Search, find and watch in Espacenet
- An update on the Cooperative Patent Classification
- Inside the mind of an EPO examiner
- How to interpret search reports drawn up by the EPO
- When to stop a search
- Efficient searching with situation-specific and adaptive search strategies
- How to apply examiner search strategies on Espacenet
- Related patent applications and patent thickets
- Unity of invention
- Combination sets in the CPC
- Non-patent literature
- Access to Asian documentation

Format

- Presentations
- Workshops
- “At the desk” sessions

Learning objectives

- On completion of the event participants will
- be familiar with EPO searching techniques and the Espacenet search tool
 - understand how EPO examiners approach patent filings through prior art searches
 - know how to critically reflect on their own search strategies
 - be able to improve their own searches
 - have an overview of major search challenges

Requirements

Participants must be from businesses or law firms and should have at least two years’ experience in the field of patent search.

Examination Matters

Reference PS05-2015
16-17 April 2015
The Hague, Netherlands

Content

- Best practice in oral proceedings (panel discussion, with epi support)
- Patent prosecution in the ICT technical field
- Case law on presentations of information, user interfaces and user preferences
- Unclear claims – Article 84 or Article 83 EPC?
- Efficient examination
- Non-technical features in the assessment of patentability
- Technical standards and substantive issues of patent examination
- Shifting the burden of proof
- How examiners within a division assess inventive step
- Observations by third parties
- The Bermuda Triangle for patents – Articles 84/83, 56 and 123(2) EPC

Format

- Presentations
- Workshops

Learning objectives

- On completion of the event participants will
- understand how examiners approach patent examination
 - have greater insight into general procedural aspects
 - have deeper knowledge of rare procedural occurrences
 - be up to date on the latest case law developments in specific areas

Requirements

This event is intended for patent attorneys who are active in the prosecution of European patent applications before the EPO.

Boards of appeal and key decisions

Reference OC02-2015
26-27 November 2015
Munich, Germany

Content

- Appeal procedure and the boards of appeal
- How to access decisions and legal information from the boards
- Recent developments in EPO case law
- Case law in specific technical fields
- Impact of board decisions on patent practice

Format

- Presentations by board members, with contributions from patent attorneys and judges
- Mock trial before a board of appeal, followed by discussion

Learning objectives

- On completion of the conference participants will be
- familiar with the appeal procedure and how the boards of appeal function
 - aware of recent developments in EPO case law

Requirements

Participants should preferably have at least four years’ experience in the field of patents.

This conference is also suitable for participants from PATLIB centres.



Target group:
staff of European national IP offices
and related institutions

All events at a glance

Target group: staff of European national IP offices and related institutions

February 4-6 February	External outreach activities (see page 23)	April 21-23 April	Novelty and inventive step – entry level (see page 18)	July 7-9 July	The European patent system from filing to grant (see page 22)
February-March	Opposition procedure at the EPO <i>Distance learning course</i> (see page 22)	28-29 April	Searching patent documents with Global patent index (GPI) (see page 13)	July-September	Drafting written opinions: EESR practice at the EPO <i>Distance learning course</i> (see page 16)
February- December	EPOQUE Net: the art of efficient searching – advanced level <i>Distance learning course</i> (see page 15)	28-30 April	Clarity and unity – entry level (see page 17)	As of July	EPOQUE Net: the art of efficient searching – intermediate level <i>Distance learning course</i> (see page 15)
March 9-11 March	Clarity and unity – intermediate level (see page 19)	April-May	Clarity and unity <i>Distance learning course</i> (see page 17)	October Five days	EPOQUE Net searches, including non-patent literature - advanced level (see page 14)
9-11 March	Clarity and unity – advanced level (see page 19)	May 5-8 May	How to understand EPO search reports and written opinions - advanced level (see page 16)	Three days	Efficient dialogue between patent examiners and patent attorneys/applicants (see page 23)
11-13 March	Novelty and inventive step – intermediate level (see page 20)	18-22 May	Patent searching (see page 12)	November Three days	Examination practice in the field of computer-implemented inventions/ disclaimers/extended subject- matter - expert level (see page 21)
11-13 March	Novelty and inventive step – advanced level (see page 20)	May	CPC for classifiers <i>Distance learning course</i> (see page 12)	December 2-3 December	IP for EU and government officials: IP and globalisation (see page 21)
23-25 March	Introduction to patent statistics and the PATSTAT product line (see page 13)	June 16-18 June	Efficient dialogue between patent examiners and patent attorneys/applicants (see page 23)		
March-April	A systematic approach to patent searching <i>Distance learning course</i> (see page 14)	June-July	Novelty and inventive step <i>Distance learning course</i> (see page 18)		

CPC for classifiers

Reference OD10-2015
May 2015
Distance learning course

Content

- Core elements in the CPC syntax and indexing schemes
- Main differences between ECLA and CPC
- Incorporation of former ICO codes and other types of classification information
- Notes, definitions and other information included in the scheme

Format

- e-learning module
- Virtual classroom sessions
- Assignment

Learning objectives

- On completion of the course participants will
- understand the structure of the CPC and how it differs from ECLA and ICO
 - be familiar with the internal structure of the CPC's classification symbols, descriptions and annotations
 - be familiar with and able to use the tools and information available for the CPC

Requirements

- Participants must have
- experience in the use of CPC in classification (and preferably search)

Patent searching

Reference PI04-2015
18-22 May 2015
Vienna, Austria

Content

- Introduction to the patent system
- The different EPO patent information products & services
- Patent searching
- Patent families and legal status information
- Asian patent information
- Business Use of patent information

Format

- Classroom training
- Presentations
- Hands-on exercises

Learning objectives

- On completion of the training participants will
- have general knowledge of the patent system and patent searching
 - have a general understanding of the benefits of patent information & how to use it
 - be familiar with the various EPO's patent information products & services
 - be able to carry out searches and look up relevant information with the main EPO patent information products

Requirements

No previous knowledge of patent searching required.

This course is also suitable for participants from PATLIB centres.

Searching patent documents with Global patent index (GPI)

Reference PI02-2015
28-29 April 2015
Vienna, Austria

Content

- Overview of EPO patent information products
- Patent information services for experts
- Basic GPI functions and queries
- Interfaces with other products

Format

- Classroom training
- Presentations
- Hands-on exercises

Learning objectives

- On completion of the training participants will have
- a comprehensive overview of EPO patent information products
 - a thorough understanding of GPI and its features
 - the ability to make best use of GPI functions and parameters
 - the skills needed to perform efficient searches

Requirements

- Participants should have
- at least three years' experience of patent searching, including searching by classification codes
 - a good understanding of the patent system

This course is also suitable for participants from PATLIB centres.

Introduction to patent statistics and the PATSTAT product line

Reference PI01-2015
23-25 March 2015
Vienna, Austria

Content

- Introduction to PATSTAT
- PATSTAT Online versus PATSTAT Raw Data
- Installing and querying PATSTAT
- Overview of tables, elements and patent indicators
- Predefined patent indicators in PATSTAT Online
- Potential pitfalls
- Linking other data sets to PATSTAT
- Result visualisation using external tools

Format

- Classroom training
- Presentations
- Hands-on exercises

Learning objectives

- On completion of the training participants will
- understand the benefits of PATSTAT over other patent information products
 - have gained insight into how PATSTAT can be used
 - be able to create and interpret statistical analyses using PATSTAT

Requirements

- Participants should
- have basic knowledge of the patent system
 - be familiar with bibliographical data found in patent documents
 - be familiar with Boolean operators
 - preferably have some knowledge of MS ACCESS and/or SQL

This course is also suitable for participants from PATLIB centres.

A systematic approach to patent searching

Reference OD05-2015
March-April 2015
Distance learning course

Content

- How to read a patent application (focusing on claims, description and embodiments)
- Establishing a search table
- Analysing retrieved documents and collating results

Format

- e-learning modules
- Virtual classroom sessions
- Tests

Learning objectives

- On completion of the course participants will be able to
- prepare a search after analysing the application
 - carry out the search, applying the appropriate strategy
 - evaluate the search results and, if necessary, refine the search
 - decide when to stop searching

Requirements

- Participants should have
- basic knowledge of patent searching

EPOQUE Net searches, including non-patent literature Advanced level

Reference OS28-2015
October 2015 (five days)
The Hague, Netherlands

Content

- New features
- Using EPOQUE Net in complex searches and specific decision processes
- Strategies for structuring and fine-tuning searches
- Searching in non-patent literature
- Cost monitoring

Format

- Classroom training
- Presentations
- Hands-on exercises

Learning objectives

- On completion of the course participants will
- have in-depth knowledge of advanced EPOQUE Net applications
 - be able to build and adapt their search concepts and strategies so as to enhance search efficiency
 - know how to search in non-patent literature databases

Requirements

- Participants should
- have at least four years' experience of search and examination at a national patent office, or
 - have completed the intermediate-level "EPOQUE Net searches" course

EPOQUE Net: the art of efficient searching Intermediate level

Reference OD07-2015
Distance learning course
Accessible online 24/7 in the second half of 2015
Live virtual classroom sessions

Content

- Use of databases: selection, combination
- Syntax: Boolean operators, truncations, exchanges of data, memories
- Syntax: combination of result sets, search statements and ranks
- Syntax, advanced: distance, proximity, exclusions
- Relevant bibliographic information: from family members to +Class
- Classification symbols – use of relevant fields
- Viewer, basics: working list and navigation
- Viewer: spotting the relevant passages, highlighting, FigureLink
- XFull, general approach: selecting databases, entering search strings
- XFull: sorting results
- XFull: facets

Format

- Recordings available for entire course duration
- Short examples shown in virtual classrooms to illustrate how tools work
- Interaction between participants and tutors in virtual classrooms

Learning objectives

- On completion of the course participants will
- have a good understanding of EPOQUE Net
 - be able to efficiently perform basic searches using EPOQUE Net

Requirements

- Participants should have
- entry-level knowledge of patent searching with EPOQUE Net
 - regular access to EPOQUE Net

EPOQUE Net: the art of efficient searching Advanced level

Reference OD08-2015
Distance learning course
Accessible online 24/7 from February 2015 until the end of the year
Live virtual classroom sessions

Content

- Use of EPOQUE Net to search actual cases
- Review of tool functionalities, in particular operators, transfer of results, viewer and XFull
- Combination of tools for different search strategies
- Comparison of results

Format

- Short assignments on practical cases set ahead of virtual classrooms
- Tutors and participants discuss solutions in virtual classrooms

Learning objectives

- On completion of the course participants will
- have a very good understanding of EPOQUE Net and how to best search with it
 - be able to consider different strategies when using EPOQUE Net for their searches

Requirements

- Participants should have
- intermediate-level knowledge of patent searching with EPOQUE Net
 - regular access to EPOQUE Net

How to understand EPO search reports and written opinions

Advanced level

Reference OC09-2015
5-8 May 2015
Ankara, Turkey

Content

- EESR and ESOP in the grant procedure at the EPO
- ISR and WO-ISA in the PCT phase
- Review of search report structure and content
- Consideration of priority at the search stage
- Categories of cited documents
- Structure and legal basis of written opinions
- Impact of the written opinion in the examination procedure
- Incomplete search and exclusions
- Assessment of novelty and inventive step in written opinions
- Clarity and lack-of-unity objections in written opinions

Format

- Presentations
- Workshops with hands-on exercises
- Discussions

Learning objectives

- On completion of the seminar participants will
- be familiar with the structure of EPO search reports and written opinions
 - have a clear understanding of the underlying concepts with a view to harmonising grant procedures
 - know how to make efficient use of the information in search reports and written opinions

Requirements

- Participants must have
- at least intermediate skills in understanding the structure and content of search reports and written opinions

This course is particularly suitable for participants working in the fields of chemistry, physics/electricity and mechanics.

It is also suitable for participants from PATLIB centres.

Drafting written opinions: EESR practice at the EPO

Reference OD09-2015
July-September 2015
Distance learning course

Content

- Purpose and scope of the European search report
- Stages of a European patent application
- Stages of an international application
- Extended European search report (EESR)
- Structure and content of the search report and search opinion (ESOP, WO-ISA)
- Evaluating search reports and written opinions

Format

- e-learning modules
- Virtual classroom sessions
- Practical exercises
- Assignments

Learning objectives

- On completion of the course participants will
- be able to issue a search report indicating the documents to take into consideration
 - be able to prepare the accompanying search opinion
 - know how to match inventions with classification systems according to the type of invention and technical problem solved (includes understanding patent documentation)
 - know enough about the internal structure of the CPC's sections to be able to undertake a reasonably quick pre-selection of relevant classes
 - be familiar with and able to use the tools that can help (pre)classify an invention
 - be familiar with techniques and information sources for consolidating and checking (pre)classification decisions

Requirements

- Participants should have substantial knowledge of
- reading, understanding and analysing patent applications
 - the basic patentability requirements
 - the basic requirements for a patent application

Clarity and unity: analysis of patent applications

Entry level

Reference OS08-2015
28-30 April 2015
The Hague, Netherlands

Content

- Overview of the European patent grant procedure
- Clarity and unity issues, and strategies for handling them in search reports
- Types of European search report and written opinion

Format

- Presentations
- Group work on practical examples
- Discussion of participants' own cases

Learning objectives

- On completion of the course participants will have
- gained insight into the basic problems associated with clarity and unity issues in applications at the search and/or examination stage
 - looked at strategies for efficiently dealing with such issues

Requirements

- Participants must have
- at least six months' experience of search and examination

This course is particularly suitable for participants working in the fields of biology/chemistry/pharmaceuticals and physics/electricity/mechanics.

Assessing clarity and unity in patent applications

Reference OD38-2015
April-May 2015 (four weeks)
Distance learning course

Content

- Clarity under Article 84 EPC
- Clarity and sufficiency of disclosure (Article 83 EPC)
- Unity of invention under Article 82 EPC
- Methods for determining unity of invention

Format

- e-learning module
- Practical exercises
- Interactive discussion through webinars and an online forum
- Virtual classroom sessions
- Assignments

Learning objectives

- On completion of the course participants will
- be able to apply the criteria for clarity and unity of invention in line with EPO practice

Requirements

- Participants should have
- at least two years' experience of searching or examining patent applications

We recommend combining this course with the entry-level course (OS08-2015) on clarity and unity (preceding this course).

Novelty and inventive step**Entry level**

Reference OS09-2015
21-23 April 2015
The Hague, Netherlands

Content

- Novelty: analysis of simple sets of claims and prior art
- Different types of prior art
- Different types of electronic document, e.g. internet disclosures
- Inventive step: the problem-solution approach
- Introduction to special cases, e.g. partial problems, alternative solutions, implicit features or non-essential/technical features
- Other indications of inventive step

Format

- Presentations
- Group work on practical examples
- Discussion of participants' own cases

Learning objectives

- On completion of the course participants will be able to
- perform feature analyses on simple sets of claims and compare the claimed subject-matter with the prior art
 - understand the different types of electronic document, including the use of documents retrieved from the internet
 - understand the basic criteria for determining novelty and inventive step
 - apply the principles of inventive step assessment using the problem-solution approach

Requirements

- Participants must have
- at least six months' experience of search and examination

This course is particularly suitable for participants working in the fields of biology/chemistry/pharmaceuticals and physics/electricity/mechanics.

We recommend combining it with OD39-2015 (distance learning course) which complements the subject-matter and is scheduled for June 2015.

Assessing novelty and inventive step in patent applications

Reference OD39-2015
June-July 2015 (four weeks)
Distance learning course

Content

- Novelty under Article 54 EPC
- Inventive step under Article 56 EPC
- Assessing prior art
- Methods for determining inventive step: the problem-solution approach

Format

- e-learning module
- Practical exercises
- Interactive discussion through webinars and an online forum
- Virtual classroom sessions
- Assignments

Learning objectives

- On completion of the course participants will
- be able to assess novelty and inventive step in line with EPO practice

Requirements

- Participants should have
- at least two years' experience of searching or examining patent applications

Clarity and unity: analysis of patent applications**Intermediate level**

Reference OS11-2015
9-11 March
Munich, Germany

Content

- Overview of the patent grant procedure
- Clarity, unity and sufficiency of disclosure issues, strategies for handling them in search reports, borderline cases
- Types of European search report and written opinion

Format

- Presentations
- Group work on practical examples
- Discussion of participants' own cases

Learning objectives

- On completion of the course participants will have
- gained insight into the problems associated with clarity, unity and sufficiency issues in applications at the search and examination stage
 - looked at strategies for efficiently dealing with such issues
 - gained basic understanding of the harmonisation of practice

Requirements

- Participants must
- have at least two years' experience of search and examination, or
 - have attended an entry-level course on clarity and unity

This course is particularly suitable for participants working in the fields of biology/chemistry/pharmaceuticals and physics/electricity/mechanics.

We recommend combining it with the intermediate (OS14-2015) or advanced (OS15-2015) course on novelty and inventive step (immediately following this course).

Clarity and unity: analysis of patent applications**Advanced level**

Reference OS12-2015
9-11 March
Munich, Germany

Content

- Strategies and legal background for dealing with clarity, unity and sufficiency of disclosure issues at the search and examination stage
- Systematic review and overview of EPO case law
- Case studies on selecting suitable strategies for handling highly complicated cases

Format

- Presentations
- Group work on practical examples
- Discussion of participants' own cases

Learning objectives

- On completion of the course participants will have
- consolidated their knowledge on dealing with clarity, unity and sufficiency issues at the search and examination stage
 - acquired and practised efficient strategies, enabling them to handle highly complicated cases and train newcomers

Requirements

- Participants must have
- at least four years' experience of search and examination
 - preferably attended last year's intermediate-level seminar

This course is particularly suitable for participants working in the fields of biology/chemistry/pharmaceuticals and physics/electricity/mechanics.

We recommend combining it with the intermediate (OS14-2015) or advanced (OS15-2015) course on novelty and inventive step (immediately following this course).

Novelty and inventive step Intermediate level

Reference OS14-2015
11-13 March 2015
Munich, Germany

Content

- Review of novelty and inventive step assessment criteria
- Review of types and uses of prior art
- Special cases, e.g. partial problems, alternative solutions, implicit features, selection inventions and feature juxtaposition/aggregation
- Other indications of inventive step

Format

- Presentations
- Group work on practical examples
- Discussion of participants' own cases

Learning objectives

- On completion of the course participants will
- have improved their knowledge and skills with regard to novelty and inventive step
 - be able to deal with special cases of novelty and inventive step
 - have a good understanding of the criteria for determining novelty and inventive step
 - be able to confidently apply the problem-solution approach for assessing inventive step

Requirements

- Participants must have
- attended the entry-level course on novelty and inventive step, and/or
 - at least two years' experience of patent examination

This course is particularly suitable for participants working in the fields of biology/chemistry/pharmaceuticals and physics/electricity/mechanics.

We recommend combining it with the intermediate (OS11-2015) or advanced (OS12-2015) course on clarity and unity (immediately preceding this course).

A very good command of spoken and written English is required for all courses.

IP for EU and government officials: IP and globalisation

Reference OS18-2015
2-3 December 2015
Brussels, Belgium

Content

- Role of European IP institutions (EPO and OHIM)
- Introduction to IP legislation, including the unitary patent
- Patents, innovation and economic implications, and the economic value of patents
- Trade marks, industrial designs and utility model protection
- Copyright: scope and main issues
- Licensing and technology transfer
- IP information access and use for the benefit of the EU and its member states
- IP and globalisation, competition law, trade regulation and standards
- Enforcement of IP rights
- IP as a strategic tool

Format

- Presentations
- Typical cases

Learning objectives

- On completion of the training participants will
- have an overview of the basics of IP protection
 - have an overview of the different products and procedures in IP protection, in particular trade marks, industrial designs and patents
 - have gained insight into topical issues related to IP
 - understand the framework of IP in general and the European patent system in particular, including the unitary patent
 - have developed a better understanding of IP in relation to competition law, trade regulations and standards

Requirements

- Participants should have
- sufficient command of the English language

This course is being organised in co-operation with the OHIM.

Examination practice in the fields of computer-implemented inventions/ disclaimers/extended subject-matter Expert level

Reference OS16-2015
November 2015 (three days)
Munich, Germany

Content

- Patenting procedures in each of the fields
- Main objections faced by applicants
- EPO case law and practice

Format

- Classroom training
- Parallel sessions
- Group work on practical examples
- Discussion of participants' own cases
- Synthesis drafting

Learning objectives

- On completion of the seminar participants will have
- advanced knowledge of special aspects of applications in the fields of computer-implemented inventions/disclaimers/extended subject-matter and the associated EPO case law and practice
 - a very good understanding of examination practice in the fields

Requirements

- Participants must have
- at least eight years' professional experience in search and examination.

For updates, please check www.epo.org/learning-events

The European patent system from filing to grant

Reference OS20-2015
7-9 July 2015
Rome, Italy

Content

- Filing a European patent application - minimum requirements
- Search and examination procedure at the EPO
- Post-grant: opposition procedure at the EPO
- Interlocutory revision procedure at the EPO
- Boards of appeal and appeal procedure
- Selection of recent board of appeal decisions
- Unitary patent and the Unified Patent Court

Format

- Classroom training
- Presentations

Learning objectives

On completion of the seminar participants will

- have a clear understanding and knowledge of the legal and practical aspects of the patent process for European applications, including the future unitary patent

Requirements

Participants must have

- sufficient knowledge of the patent system

This course is also suitable for participants from PATLIB centres.

Opposition procedure at the EPO

Reference OD19-2015
February-March 2015 (five weeks)
Distance learning course

Content

- Purpose of the opposition procedure
- Nature of opposition proceedings (first-instance, inter partes)
- Basis for filing opposition (entitlement, grounds and parties)
- Opposition period, admissibility and right to be heard
- Oral proceedings
- Maintenance, amendment and revocation
- Effect on the European patent, including stay of national court proceedings
- Apportionment of costs

Format

- e-learning module
- Virtual classroom sessions

Learning objectives

On completion of the course participants will

- have a clear overview of the procedure
- understand the fundamental aspects of filing oppositions
- be capable of informing their public of the basis for filing oppositions and the main issues to be addressed
- be capable of informing their public of the basic consequences at national and European level

Requirements

Participants must have

- at least two years' experience of search and examination

Efficient dialogue between patent examiners and patent attorneys/applicants

Reference OT24-2015
16-18 June 2015
Oslo, Norway

Reference OS23-2015
October 2015 (three days)
Madrid, Spain

Content

- Basics of communication
- Efficient written communication with attorneys/applicants
- Efficient communication with attorneys/applicants in interviews
- Exchange of best practice with EPO experts

Format

- Presentations
- Hands-on exercises
- Role playing

Learning objectives

On completion of the seminar participants will

- be able to communicate more effectively with attorneys and applicants, both orally and in writing

Requirements

Participants must have

- at least two years' experience of patent examination
- basic experience of communicating with attorneys/applicants

This course is being organised in co-operation with epi.

Reference OT24-2015 is a national office course. It is also open to staff from NPOs in the Nordic and Baltic states.

External outreach activities: communication plan for IP offices

Reference OC29-2015
4-6 February 2015
Copenhagen, Denmark

Content

- How to identify the different potential target audiences (customer segments)
- Fundamental principles for reaching your target audience
- Mailing, communication campaigns, purchase of contact files: "What works? What is appropriate for my IP office? How do I get through?"
- How to plan and implement communications: (a) globally, and (b) to sell a new project or product to a certain group of users
- Towards the financial sustainability of outreach actions: "What is my client ready to pay for?"
- IP information services: machine translation, Federated Register, Espacenet, TMview, IP Observatory
- Internet and social media: making your IP office accessible everywhere in appropriate form
- Benefits of outreach campaigns: seeds for the future (towards high-level products and services)

Format

- Lectures by specialists
- Group work on practical examples
- Discussion of participants' own practice and experience

Learning objectives

On completion of the seminar participants will be familiar with

- the rules of customer segmentation in their target market
- good practice in awareness and outreach implementation, in particular through the internet and social media

Requirements

Participants should have

- at least two years' experience in the field of IP communication, promotion and marketing

This course is being organised in co-operation with the OHIM. It is also suitable for participants from PATLIB centres.

Target group:
staff of non-European national IP offices
and related institutions

Web Site

Module 3: Designing search strategies

Toolbox > The database > Where to search?

Where to search?

There are many different databases and sources of information where we can search for technical literature. The main ones are:

- the internet
- non-patent literature databases
- patent literature databases
- databases relating to specific technologies

This section provides a brief overview of some of the options, including their advantages and drawbacks.



"Hm, now where should I start? And do I use the same strategy regardless of what database I choose?"
"That's a good question, Adrian. In principle, every application is different. However, a lot depends on the technology. In some fields patent is the most important source, in others we need to explore other sources."

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MacBook Pro

More than half of the patent applications processed at the EPO originate from countries other than the member states of the European Patent Organisation. Thus it is only natural that the EPO offers training opportunities for patent system stakeholders and users in these countries, too. These training activities are implemented by the European Patent Academy according to the principles of complementarity and subsidiarity and within the framework set by the EPO's international co-operation policy. With over ten years' experience in patent-related professional training, the Academy continuously adapts and improves its training offering on the basis of regular user feedback and the latest teaching and learning technology.

Its training activities aim at capacity-building at the partner offices of non-member states in support of:

- the patent grant procedure;
- the design and implementation of individual patent-related outreach programmes.

The training packages are addressed to two different target groups:

- **Curriculum “E” for patent examiners** supports the development of patent search and examination skills within the EPO's partner offices, using the European Patent Convention (EPC) as reference. It also comprises modules for ensuring the sustainability of this crucial aspect of co-operation between the EPO and its partners.
- **Curriculum “P” for patent information and awareness specialists** is intended to complement training for individual outreach programmes of the partner offices in the field of patents. It is mainly based on the EPO's patent information policy and products, but also draws on certain European best practices. It is strictly confined to patent-related matters.

The modules reflect the result of a regular needs analysis carried out by the EPO and its partner offices. Since not all of the modules presented in this catalogue can be implemented every year, this comprehensive overview is designed to help plan and facilitate training activities over an extended period, to ensure the sustainability of the training results achieved.

Courses in series E1 cover the various aspects of patentability.

The basic module has mainly been designed for newly recruited examiners or examiners with very limited experience. It comprises an introduction to analysis of patent documents and an overview of the roles of major stakeholders. This is complemented by an advanced module on more complex questions covering specific aspects of patent examiners' work.

A “train the trainers” module can be implemented with national IP offices with a significant proportion of young examiners. This module is designed exclusively for current or future trainers of examiners, to provide for sufficient experience within such offices.

Advanced classroom training helps consolidate knowledge of search and examination and also introduces advanced aspects of patentability in specific technical areas.

Module E1.1: Patenting, basics *Distance learning course*

Introduction to patents
Structure of a patent document
Major stakeholders in the patent system
Introduction to patentability criteria

Module E1.2: Patenting, advanced *Distance learning course*

Assessment of novelty, inventive step, clarity
Dealing with non-unity
The problem-solution approach
Sufficiency of disclosure
Exclusions from and exceptions to patentability

Module E1.3: Patenting, training trainers *Distance learning course*

Pedagogical principles
Preparing suitable examples and training materials
Soft skills

Module E1.4: Patenting in particular technical areas *Classroom training*

Claim analysis
Patentability criteria
Developing appropriate search strategies

Courses in series E2 cover the various aspects of patent searching.

The basic module introduces new examiners or examiners with limited experience to the basics of searching. It can be complemented by advanced modules that consolidate the knowledge of experienced examiners and enhance their skills in order to further improve efficiency in carrying out searches, using the

search tools that are at their disposal within their daily working environment. A “train the trainers” module can be implemented with national IP offices with a significant proportion of young examiners. This module is designed exclusively for current or future trainers of examiners, to provide for sufficient experience within such offices.

<p>Module E2.1: Patent search <i>Distance learning course</i></p> <p>Reading a patent application, focusing on claims, description and embodiments</p> <p>Establishing a search table</p> <p>Collating results; analysing the results retrieved</p>	<p>Module E2.2: Searching in specific technical fields <i>Classroom training</i></p> <p>Free databases</p> <p>Non-patent literature</p> <p>Technical field-specific databases</p>	<p>Module E2.3: Searching, training trainers <i>Distance learning course</i></p> <p>Pedagogical principles</p> <p>Preparing suitable examples and training materials</p> <p>Soft skills</p>
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Courses in series E3 are designed for active users of the EPOQUE Net system.

The introductory module is implemented on site shortly after EPOQUE Net has become operational at a national IP office. It is designed as a kick-start service to help examiners get started with the system immediately and gather their own initial experiences. Fostering learning over an extended period, the

advanced module has been designed to provide EPOQUE Net users with the self-confidence and proficiency they need to perform quality searches independently. For national IP offices where EPOQUE Net is fully integrated in the examiners’ daily workflow, a “train the trainers” course can be offered.

<p>Module E3.1: EPOQUE Net, starter <i>Classroom training</i></p> <p>Comprehensive introduction to EPOQUE Net and getting started</p> <p>Structure of databases</p> <p>Query language</p> <p>Support available on EPOXY</p>	<p>Module E3.2: EPOQUE Net, sustained training <i>Distance learning course</i></p> <p>Proximity operators</p> <p>Patent families</p> <p>Classification, CPC codes</p> <p>Viewer</p> <p>Synonyms, other classification schemes and more truncation operations</p>	<p>Module E3.3: EPOQUE Net, training trainers <i>Classroom training</i></p> <p>Pedagogical principles</p> <p>Preparing suitable examples and training materials</p> <p>Soft skills</p>
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A very good command of spoken and written English is required for all courses.

Courses in series E4 are aimed at developing classification skills at national IP offices.

The main distance learning course of the basic module can be based on either the IPC or the CPC, explaining the importance of patent classification for examiners. It presents existing classification schemes and the differences between them. The module introduces users to retrieving patent documents using the respective classification scheme as well as to the basics of classifying with it. It can be complemented

by CPC training for specific technical fields that can be provided in traditional classroom style or by means of webinars.

Experienced examiners at offices with a large number of national applications who are entrusted with training their colleagues on classification can enrol for a “train the trainers” module on classification.

<p>Module E4.1: Classification, basics <i>Classroom training/ distance learning course</i></p> <p>An introduction to patent classification (IPC)</p> <p>Use of classification for patent search and patent document classification for beginners (IPC or CPC)</p> <p>Overview of CPC</p> <p>CPC in specific technical fields, up to sub-class level</p>	<p>Module E4.3: Classification, training trainers <i>Distance learning course</i></p> <p>Pedagogical principles</p> <p>Preparing suitable examples and training materials</p> <p>Soft skills</p>
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For updates, please check www.epo.org/learning-events

Courses in series E5 address the main aspects of communication between examiner and applicant.

An introductory module provides the basis for national IP offices to make use of search products for applications that have already been processed by the EPO. Classroom training courses or webinars in this module explain to examiners at such offices how to retrieve and understand search reports and written opinions issued by EPO examiners and also how to consult and re-use EPO examiners' work.

The advanced comprehensive module trains examiners to draft search reports and written opinions in accordance with established quality criteria applied at the EPO. These modules are particularly designed for

examiners at national IP offices to help them efficiently process applications that are filed for the first time with their office.

For offices with a significant number of first filings, a "train the trainers" course on drafting search reports and written opinions could be organised for experienced examiners entrusted with training their colleagues on these topics.

An additional module could complement the advanced module, in particular for offices with a large number of foreign applications pending.

<p>Module E5.1: Making best use of EPO work products <i>Classroom training</i></p> <p>How to retrieve European search reports and written opinions</p> <p>File inspection – how to consult other work products of EPO examiners</p>	<p>Module: E5.2 Search reports and written opinions <i>Distance learning course</i></p> <p>Applying patentability criteria</p> <p>Drafting search reports and written opinions</p>	<p>Module E5.3: Search reports and written opinions, training trainers <i>Classroom training/ distance learning course</i></p> <p>Pedagogical principles</p> <p>Preparing suitable examples and training materials</p> <p>Soft skills</p>
<p>Module E5.4: Efficient patent examination <i>Distance learning course</i></p> <p>Communication with the applicant/tactics</p> <p>Amendments</p> <p>Efficient examination of second filings</p>		

Series E6 supports national IP offices in ensuring long-term sustainability.

This module is intended primarily for offices where the training of examiners constitutes a significant investment for both the office and the EPO. It will mainly be implemented as a distance learning course, accompanied by traditional workshops or online collaboration. The module will be designed to

support the national IP offices to get the best long-term value from the training delivered by the EPO to their patent examiners. It is intended for offices that invest in establishing a coaching structure in addition to their internal training and in order to ensure its sustainability.

**Module E6:
Training coaches**
Distance learning course

- Selecting coaches
- Basics of coaching
- The use of the learner's logbook

Courses in series E7 help with getting to know the EPO better.

Courses in series E7 provide updates and in-depth information on particular aspects of the European patent grant procedure and on recent developments

at the EPO, as well as highlighting major features. They can take the form of traditional classroom training, public conferences or webinars.

Module E7.1: The European patent grant procedure <i>Distance learning course</i>	Module E7.2: The boards of appeal of the EPO <i>Classroom training</i>	Module E7.3: Quality assurance <i>Distance learning course</i>
European patent Unitary patent	Functioning and internal organisation of the EPO's boards of appeal EPO case law	Guidelines/manuals Internal procedures Quality assessment
Module E7.4: Data exchange standards <i>Classroom training</i>	Module E7.5: The EPO as ISA and IPEA <i>Distance learning course</i>	Module E7.6: The European patent system <i>Classroom training</i>
IT standards Standard exchange formats Processing, corrections Preparing for data exchange	Procedure before the EPO as ISA Supplementary international search The EPO as IPEA Euro-PCT procedure before the EPO	European patenting practice Recent developments Topical issues Case studies

Courses in series P1 support national IP offices in their efforts to promote the use of patent information.

A basic module comprises patent information for beginners, providing an overview of the existing EPO patent information products and an introduction to searching patent information in Espacenet and the European Patent Register.

More advanced modules introduce the EPO patent information services for expert users. Complementary modules are intended to train users in the professional use of Espacenet, the European Patent Register and the Global patent index.

Module P1.1: The basics of patent information <i>Classroom training/ distance learning course</i>	Module P1.2: EPO patent information products for experts <i>Distance learning course</i>	Module P1.3: Becoming an Espacenet and European Patent Register expert <i>Classroom training</i>
Introduction to patent terminology The patent grant system EPO patent information products Tutorials on Espacenet and the European Patent Register	Searching patent information services for experts Asian patent information EP bulletin Global patent index (GPI) Legal status data Using PATSTAT	Structure and layout of Espacenet Search options Sorting and sharing results Smart search Searching with the CPC Common Citation Database (CCD) Machine translations Non-patent literature, DOIs Procedural and legal status data
Module P1.4: Becoming a Global patent index and European Patent Register expert <i>Classroom training/ distance learning course</i>		
Structure and layout of the Global patent index (GPI) Search options Customising the GPI Machine translations Search strategies		

Courses in series P2 highlight the use of patent information in relation to emerging technologies.

These courses are based on two specific classification schemes that form part of the CPC, namely Y02 and Y04S, relating to clean technologies and smart electrical grids.

The two classification schemes are intended as a support to decision-makers and as an important factor in creating business strategies and synergies.

Module P2.1: Patent information and clean technologies <i>Classroom training</i>	Module P2.2: Patent information and smart electrical grids <i>Classroom training</i>
Overview of the CPC	Overview of the CPC
The Y section	The Y section
Searching the Y02 scheme	Searching the Y04S scheme
Interpreting search results	Interpreting search results

Courses in series P3 are aimed at sharing European best practice in patent information and patent awareness.

The duties of national IP offices also include patent awareness raising and patent education among current and future users of the national patent systems.

- training trainers in using three particular products developed by the EPO: Espacenet, Global patent index and the IP Teaching Kit, for IP teaching at universities;
- developing a network of patent information specialists who know how to make best use of European best practice at patent library centres and of the ip4inno methodology, the latter limited to patent-related matters.

These courses are intended to develop skills and build capacities at national IP offices, in particular:

Module P3.1: Training Espacenet trainers <i>Classroom training/ distance learning course</i>	Module P3.2: Training Global patent index trainers <i>Classroom training/ distance learning course</i>	Module P3.3: Training trainers in promoting the Patent Teaching Kit <i>Distance learning course</i>
Pedagogical principles	Pedagogical principles	Pedagogical principles
Detailed review of functionalities	Search strategy	Structure of the teaching kit
Delivery methods and media	Search options in the GPI	Preparations
Tutored exercises	Patent information tools in patent information services for experts	Examples
	Procedural and legal status data	
Module P3.4: Training ip4inno trainers <i>Classroom training/ distance learning course</i>	Module P3.5.1: Training trainers on pre-filing searches and consultancy services for local IP centres <i>Classroom training/ distance learning course</i>	Module P3.5.2: Pre-filing searches and consultancy services for local IP centres <i>Distance learning course</i>
Pedagogical principles	Pedagogical principles	Pre-filing searches
Reflection on ip4inno modules: Patent basics Patent information for business decision-making Patent searching in Espacenet Practical workshop in Espacenet PR work for SMEs on IP	Tutored reflexions on: pre-filing searches	Informative search report
	Informative search report	Consultancy on licensing
	Consultancy on licensing	

A very good command of spoken and written English is required for all courses.

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Module E1.4	Patenting in particular areas, focus on mechanics, CII, electricity (Intermediate level) <i>Classroom training</i> Q2/three days Ref. N10-2015 Participants should have a minimum of one year's experience of searching or examining patent applications.	Module E 3.2	EPOQUE Net, the art of efficient searching (Advanced level) <i>Distance learning course</i> February to December Ref. OD08-2015 Participants must have completed an intermediate level course on EPOQUE Net, such as ND02-2013 or ND02-2014.	Module E7.2	The boards of appeal of the EPO: EPO case law (Advanced) <i>Classroom training</i> 26-27 November Ref. OC02-2015 Participants should preferably have at least four years' experience in the field of patents.
Module E2.1	A systematic approach to patent searching (Entry level) <i>Distance learning course</i> March-April Ref. OD05-2015 Participants should have a minimum of one year's experience of searching or examining patent applications.	Module E 4.1	Classification, basics (CPC) (Entry level) <i>Distance learning course</i> Open access Participants should have a basic knowledge of the patent system.	Module E7.5	The EPO as ISA and IPEA (Intermediate level) <i>Distance learning course</i> Open access Participants should have a basic knowledge of the patent system.
Module E3.1	EPOQUE Net, starter (Entry level) <i>Classroom training</i> Q1/four days Ref. NT12-2015 Ref. NT13-2015 Participants should have a good knowledge of patent search and have access to EPOQUE Net.	Module E5.1	Re-using the work products of the EPO (Entry level) <i>Classroom training</i> Q3/three days Ref. NT08-2015 Participants should have a minimum of one year's experience of searching or examining patent applications.	Module E7.6	The European patent system (Entry level) <i>Classroom training</i> Q1/three days Re. NT11-2015 Q2/two days Ref. NT14-2015 Participants should have a basic knowledge of intellectual property and the patent system in particular.
Module E3.2	EPOQUE Net, the art of efficient searching (Intermediate level) <i>Distance learning course</i> Second half of year Ref. OD07-2015 Participants should have a basic knowledge of patent search and have access to EPOQUE Net. Experience in the use of EPOQUE Net would be an advantage.	Module E5.2	Search reports and written opinions (Intermediate level) <i>Distance learning course</i> Q3 Ref. OD09-2015 Participants should have substantial knowledge of analysing patent applications and patentability requirements.	Module P3.3	Training trainers in promoting the IP Teaching Kit (Entry level) <i>Distance learning course</i> Open access Participants should have teaching experience and possess a copy of the IP Teaching Kit.
		Module E7.1	Opposition procedure at the EPO (Intermediate level) <i>Distance learning course</i> February-March Ref. OD19-2015 Participants must have at least two years' experience of search and examination.		



Target group:
professional representatives

Professional representatives

To ensure that the patent prosecution process at the EPO is efficient throughout, it is essential that professional representatives before the EPO have access to the training they need. Preparing patent professionals to pass the EQE and supporting their further vocational training is a key objective of the European Patent Academy.

The Academy organises training events and an e-learning course on the EQE pre-examination paper. The EQE online training course is a comprehensive collection of reading materials and multiple-choice questions, along with many hours of video recordings and virtual classrooms.

The EPO supports the Centre d'Études Internationales de la Propriété Intellectuelle (CEIPI) in organising classroom training under the "EURO-CEIPI" banner, where senior professional representatives teach alongside EPO examiners, lawyers and members of the boards of appeal.

For EQE candidates coming from member states having no more than five EQE-qualified professional representatives, the EPO provides academic and financial support in their preparations for the EQE through the Candidate Support Project.

The oral proceedings workshop will be offered again in 2015. It aims to provide a complete overview of the legal provisions and case law regulating oral proceedings and to let participants experience at first hand (through role-playing) how best to put this into practice.

Professional representatives will have the opportunity to learn about the latest developments in practice from experts in the different technical fields: at the Examination Matters event, examiners will present 25 different interactive workshops covering all aspects of the procedures (see page 6).

The Academy and the Institute of Professional Representatives before the European Patent Office (epi) closely co-operate in running numerous lectures across the member states, on topics such as opposition and appeal or the life of a patent, and in organising the roadshow on Article 123(2) EPC and Guidelines2DAY.

The Praktika Intern programme offers patent attorneys with experience of the European patent grant procedure an opportunity to work for three weeks as interns under the supervision of an examiner.

Candidate Support Project

- A preparatory session providing information on the organisation of the EQE examinations and how to prepare for them
- Classroom training and tutorials
- Distance learning (based on classical and modern media), comprising knowledge exchange amongst the students, virtual classroom training, assignments and homework with feedback given by EPO or epi tutors
- A personal epi coach available to answer individual questions and help with assignments

www.epo.org/eqe-csp

EQE online

- Forum with over 8 000 registered users, covering past EQE papers and examination techniques
- Mock papers
- Time limit calculator for Paper D
- Daily questions
- Newsletter

www.eqe-online.org

EQE pre-examination

- In-depth articles on major EQE topics, with self-evaluation questions
- Further sets of multiple-choice questions
- Video tutorials
- In-depth case studies
- Virtual classroom sessions with tutors
- Access to a dedicated support forum

www.epo.org/pre-exam

EURO-CEIPI

- Basic training course on European patent law
- CEIPI seminar for the EQE pre-examination
- "Cramming course" for the pre-examination
- Pre-prep courses
- Preparatory seminars for the EQE
- Special Paper C course
- Cramming course for Paper C

www.ceipi.edu

"Oral proceedings" workshop

- Oral proceedings at the EPO - preparation, etiquette and execution
- Important procedural aspects and case law relating to oral proceedings
- How to handle EPO opposition proceedings as a patent attorney
- Differences in oral proceedings before the department of first instance and before the boards of appeal
- Coached case studies as mock oral proceedings (2)
- Debriefing on case studies

Roadshow on Article 123(2) EPC and Guidelines2DAY

- A review of the basic principles behind Article 123(2) EPC
- Updates on the interpretation of Article 123(2) EPC
- Overview of the new Guidelines for Examination
- New procedure under Rule 164 EPC
- New procedure for handwritten amendments



Target group:
judiciary

While the EPO serves as the granting authority for European patents, there has until now been no common jurisdiction to enforce them. This results in parallel litigation on the same patent in different countries, and in differing decisions being handed down by national judges. The European Patent Academy aims to promote harmonised jurisprudence in the member states by working to create a sound knowledge of patent litigation amongst the judiciary.

The Academy supports the judiciary in training on patent matters through varied offerings. The patent grant procedure, issues arising in patent litigation and infringement proceedings, and specific patent law issues are included in different types of training, such as study visits, internships, conferences, seminars and workshops. Our training events also include interactive mock trials at different levels of difficulty. Training is organised at different levels of difficulty to cater judges' experience in patent litigation or specific requests.

The first tranche of e-learning modules of the programme "Patent litigation A-Z" will be available online, free-of-charge for the judiciary. These modules will provide a comprehensive overview of all the elements and issues arising in patent litigation and infringement procedures.

In 2012, the Academy launched the EPO's Judicial Internship programme, where national judges have the opportunity to spend a month with the boards of appeal. The trainees spend one week in intensive and in-depth training on patentability requirements and the appeals procedure, followed by three weeks "shadowing" a board of appeal. This programme is run on an annual basis.

The Academy also hosts a number of conferences on specific issues, as well as supporting judges attending conferences of interest (for example the EPO boards of appeal conference, see page 7).

Patent litigation seminar (introductory level) - example

- The importance of IP to innovation and economic growth in Europe
- An overview of the Unified Patent Court
- Framework of the patent system in Europe and patentability requirements
- Scope of protection
- Practical workshop on scope of protection
- Defences and procedural issues
- Implementation of the Enforcement Directive
- Interactive mock trial

Patent litigation seminar (intermediate level) - example

- Validity issues, e.g. obviousness and sufficiency, including case law comparisons
- Contributory infringement
- Interpretation of claims according to Art. 69 EPC
- Remedies and injunctive relief
- Mock trial

Patent litigation seminar (specific topics and intermediate level) - example

- Patentability requirements and basics of chemical/pharmaceutical compounds
- Enlarged Board of Appeal decisions
- Stay of pending opposition proceedings - country comparisons
- Tension between scope of protection and validity in pharmaceutical cases
- Preliminary injunctions
- The role of experts

Study visit to the EPO - example

- The life of a file
- Patentability requirements
- Case studies
- The appeals procedure
- Scope of protection and workshop
- Observing oral proceedings

Judicial Internship programme - example

- Intensive training on substantive patent law: patentability requirements
- Studying case files and participating in oral proceedings
- Visits to the Munich District Court and the German Federal Patent Court
- Exchange sessions with the boards of appeal
- Mock trial where judicial interns preside over a case argued by patent attorneys

In 2013, the Agreement establishing the Unified Patent Court (UPC) was signed, and this will ensure that one court will be a single point of jurisdiction competent to deal with litigation on the unitary patent and, in the future, the classical European patent.

Last year, a Memorandum of Understanding (MoU) was concluded between the EPO and the UPC Preparatory Committee for the training of a selected number of UPC candidate judges in preparation for the new court. Under the MoU, the Academy will provide a number of training components to the selected candidate judges.

The training will be co-ordinated and organised by the UPC Training Centre in Budapest. It will consist of different modules, and will be tailored to the level of patent litigation experience the candidates are grouped by:

- Patentability requirements (one-week intensive course)
- Patent infringement issues and procedures (one-week intensive course)
- UPC Rules of Procedure (including patent topics)

Furthermore, the judges will have access to a number of patent terminology booklets that will consist of information and terms crucial in their business. These can be used for self-study or in combination with a language course.



Target group:
academia and business

The European Patent Academy offers a wide range of activities aimed at strengthening IP culture in tertiary-level academic institutions (such as universities) and public research organisations across the member states of the European Patent Organisation. These activities are carried out in close co-operation with national IP offices.

Academic and research organisations invest heavily in creating scientific knowledge, much of which could be susceptible to patent protection and commercialisation. A clear IP policy and a proper IP management infrastructure need to be put in place to ensure that full benefit is derived from this investment, through technology transfer and commercialisation of research results - which is a component of their new mission of generating wider socio-economic benefits. IP rights facilitate this, and university management needs knowledge of the IP system.

IP management policy is often implemented by technology transfer offices (TTOs), whose staff need to have a good understanding of how to use IP rights. They help to transfer the knowledge to business, preventing gaps in its exploitation, and IP evens up the incentives for researchers and business that might otherwise hamper further value creation.

Today's students - tomorrow's engineers, lawyers, researchers, designers, managers and entrepreneurs - need to have at least a basic understanding of the nature of IP and its importance to society. This will enable them to use the patent system to support innovation in their future careers. Europe's educational institutions are in the best position to impart this knowledge, by incorporating it into their curricula. Students and researchers also need to be better aware of the wealth of technical information available in published patent documents.

The Academy supports these institutions in introducing IP subject-matter into a broad range of faculties, including science and engineering and business studies. It aims to reach students across all faculties and to train professors, teachers and staff of TTOs, and it also underlines the value of IP at the level of policy-makers working in an educational framework. In support of its objectives, the Academy works with IP teaching experts to establish minimum standards and essential elements for IP education.

Academy services

- Train-the-trainer workshops for university and TTO staff on how to use the Academy's teaching material
- Training on how to use IP information tools and services.
- IP rights training for university researchers.
- Support for IP teaching in academic institutions by providing trainers or lecturers as part of a course covering IP, summer schools or stand-alone lectures; by providing teaching and training material (see page 50ff.).
- Study visits to the EPO intended for groups of students to give basic or more advanced training on IP, from either a technical viewpoint (e.g. aspects specific to a narrow technical field) or a legal perspective.
- Support for creating and extending IP-related networks in academia.

One-day "train-the-trainer" workshop with the IP Teaching Kit - example

- Introduction to the IP Teaching Kit and the IP course design manual
- "Protect your inventions" lecture
- Understanding patent claims
- Round table: teaching IP rights issues in a specific country
- A lecturing experience with the IP Teaching Kit
- Searching for patents

One-day programme for master's students in intellectual property law - example

- Examination and procedural issues in the EPO: inside the mind of an examiner (1/2)
- Recent developments in the European patent system and the outlook for the future: the unitary patent and the way ahead
- Working with an examiner
- Question-and-answer session

The European Patent Academy provides training at a variety of levels directed at businesses, especially new small and medium-sized enterprises (SMEs) in Europe. These activities are carried out in close co-operation with national IP offices.

SMEs are among the most dynamic businesses in Europe. For many of them, proper protection of their intellectual assets is an essential element of their business model. This is effected through securing the necessary IP rights. In addition, businesses need freedom to operate for their products and services so that they are not infringing third-party IP rights which otherwise might block them. IP culture among SMEs needs to be strengthened to ensure the future competitiveness of the sector as a whole. IP facilitates the transfer of knowledge, to avoid gaps in the exploitation of valuable research results. It also evens up the incentives for researchers and industry that might otherwise hamper further value creation. SMEs can also make valuable use of the wealth of technical and commercial information available in published patent documents.

The audience for the training services for business includes all the potential sources of advice to which a business might turn: for example, chambers of commerce, patent information centres, licence brokers, lawyers and financial service providers. These intermediaries propagate messages about good patent strategies to an ever-growing audience of managers, designers, engineers and scientists.

Academy services

- Annual show-case events aimed at particular audiences; for example Search Matters for professional searchers (see page 6).
- Teaching through associations and networks reaching a wide audience of SMEs and their advisors, covering basic or more advanced training on IP from a business perspective.
- Support for IP teaching in businesses by providing trainers or lecturers either as part of a training event or for stand-alone lectures.
- "Train-the-trainer" sessions aimed at encouraging - and enabling - others to spread their knowledge of IP.
- Online training including self-guided e-learning content on the EPO website, webcasts and virtual classroom sessions (see page 52).

One-day seminar "From research to commercialisation: life science inventions" - example

- An introduction to IP
- Life science inventions
- Patenting strategy
- Case study
- Searching for patents

Three-day winter school for members of the Enterprise Europe Network (EEN) - example

- Convincing SMEs that patents and IP matter to them - principles of outreach with IP
- Open innovation
- Case study - example of an SME's use of IP
- Building a business
- An introduction to IP rights issues in day-to-day EEN practice
- IPR Helpdesk service
- Patent information for business decision-making
- Patent searching - practical class
- Practical exercises and case studies
- Patentopolis - IP training game

IP Teaching Kit

The European Patent Academy, in association with the EU's Office for Harmonization in the Internal Market (OHIM), is launching a comprehensive set of teaching materials on IP (including patents, trade marks, copyright, designs and trade secrets). It provides a series of self-explanatory modules that can be used to develop IP training, with speaking notes, background information and ready-made presentation material. Most of the modules also contain exercises and case studies to demonstrate the relevance of the topics in practice.

The kit is intended for use by teaching professionals and covers a whole range of possible target audiences, from complete beginners to more advanced students seeking help on specific topics. The kit provides targeted information, allowing simple messages to be delivered in an appealing and attractive manner.

The IP Basics module follows the successful Patent Teaching Kit launched by the European Patent

Academy in 2010 (and now with over 7 000 copies in circulation). It contains the tools and information to deliver a one- to two-hour lecture on the role of IP.

IP Advanced has been designed for teachers of students with some previous knowledge of IP, in order to provide them with advanced teaching material as well as practical examples and exercises relating to patents, utility models, designs, trade marks, trade secrets and copyright. IP Advanced also introduces students to IP management, including how to consolidate and protect IP, how to use it to support the commercial exploitation of technologies, and how to search in databases.

Other modules of the IP Teaching Kit will appear in the course of 2015. Together they will form one of the most complete teaching resources on IP in the world. The kit is offered free of charge for non-commercial use.

The various modules of the IP Teaching Kit can be downloaded from: www.epo.org/teaching-kit

The modules at a glance

Section 1: IP Basics	Section 2: IP Advanced	Section 3: IP search tools
IP basics	Patents, utility models and designs	Espacenet
Patents	Trade marks, trade secrets and copyright	European Patent Register
Databases	IP management policies, strategies and management	TMview and other information sources on trade marks and designs
Trade marks		
Designs		
Geographical indications		
Utility models		
Plant variety rights		
Semiconductor topography rights		
Copyright slide		
Trade secrets		

IP course design manual

The Academy's IP course design manual makes it easier for university lecturers to introduce or offer more in-depth IP programmes in various courses of study and educational programmes.

It contains a wide range of modules designed to cover all aspects of IP. The manual does not deliver teaching material itself, but provides a series of possible curriculum scenarios covering the main topics of IP along with comments, references and links. The manual explains to teaching staff how to design their IP courses or simply introduce stand-alone elements into their IP teaching.

The manual provides a full list of suggested topics. In addition, for each module the learning objectives, target audience, prior knowledge required, related modules, teacher profile and suggested duration are indicated.

The manual will be of particular interest to those studying business/economics, innovation management and law and across a range of levels, from undergraduate to postgraduate and beyond.

Visit www.epo.org/design-manual to find out how to get your copy.

The modules at a glance

Section 1: Introductory modules	Section 2: IP management and commercialisation	Section 3: IP law
Introduction to IP	Financing and IP	IP contracts
Introduction to IP law	The commercialisation of IP	IP and competition law
History of IP	IP licensing agreements and negotiations	IP litigation
Section 4: IP law and management for specific disciplines	IP, R&D and knowledge transfer	Section 5: Student projects
IP for computer scientists and software engineers	Using patent information	Using patent information for R&D in environmentally sound technologies (EST)
IP for biotechnologists	IP valuation	Initiating an EST-based start-up/spin-off
IP and the creative industries	Defending IP assets: IP infringement and breach of confidentiality	The effects of international IP law on EST
IP for designers	IP and due diligence	

ip4inno

Industry often has a different set of IP training needs - the same subject-matter is looked at from a different vantage point. The Academy supported the EU’s ip4inno project, which resulted in almost 60 hours of training material specifically directed to the IP needs of business.

There are modules dealing with business issues relating to obtaining and maintaining IP rights, as well as how to commercialise innovation on the basis of a portfolio of IP rights. A number of case studies were also incorporated into this material.

Visit www.epo.org/ip4inno to find out how to get access.

The modules at a glance

<p>Section 1: Industrial property</p> <p>Patents, utility models and plant varieties</p> <p>Registered trade marks and designs</p> <p>Using patents, trade marks and designs in business</p>	<p>Section 2: Other intellectual property</p> <p>Copyright and related rights</p> <p>“Soft” IP</p> <p>Using copyright and “soft” IP in business</p>	<p>Section 3: Patent information</p> <p>Patent information for business decision-making</p> <p>Patent searching in Espacenet</p> <p>Practical workshop on Espacenet</p>
<p>Section 4: IP commercialisation</p> <p>IP commercialisation</p> <p>Business planning with IP</p> <p>IP licensing</p> <p>IP valuation and financing</p> <p>Open innovation</p>	<p>Section 5: Enforcement</p> <p>Enforcement of IP rights</p> <p>Practical exercises and case studies</p> <p>Patent enforcement and ADR</p>	<p>Section 6: Focus on SMEs</p> <p>IP issues for three very different sectors: “creative” industries, ICT and software, and biotechnology</p> <p>“Selling the message”</p>

Case studies

The Academy has supported the production of a special issue of the California Management Review dealing with IP management. It contains a number of case studies analysing the use of IP by industry and academia in detail, examining the benefits and dangers faced when making decisions on IP. Two of the case studies covered also form part of the IP Teaching Kit.

Content

- Building Appropriation Advantage: An Introduction to the Special Issue on Intellectual Property Management
- Towards the (Strategic) Management of Intellectual Property: Retrospective and Prospective
- Managing Intellectual Property Using Patent Pools: Lessons from Three Generations of Pools in the Optical Disc Industry
- IP Models to Orchestrate Innovation Ecosystems: IMEC, a Public Research Institute in Nano-Electronics
- IP Modularity: Profiting from Innovation by Aligning Product Architecture with Intellectual Property
- Recovering Abandoned Compounds Through Expanded External IP Licensing
- Value Articulation: A Framework for the Strategic Management of Intellectual Property
- Protecting Growth Options in Dynamic Markets: The Role of Strategic Disclosure in Integrated Intellectual Property Strategies
- Operational Challenges and ST’s Proposed Solutions to Improve Collaboration between IP and R&D in Innovation Processes
- Strategic Management of Intellectual Property: An Integrated Approach
- Managing the Intellectual Property Disassembly Problem

Visit www.epo.org/case-studies to find out how to get your copy.

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Responsible for the content
Richard Flammer
Principal Director
Patent Information - European Patent Academy

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European Patent Academy

European Patent Office

Bob-van-Bentham-Platz 1

80469 Munich

Germany

Tel. +49 (0)89 2399 - 5454

academy@epo.org

www.epo.org/learning