Improving the efficiency of the patent system

Training overview 2014

European Patent Academy
Foreword

This is the first time that the European Patent Academy has published a training catalogue that lists conferences, seminars and workshops for all of the roughly 80 national IP offices with which we co-operate, both in the member states of the European Patent Organisation and on other continents.

The many events for member-state offices are presented in the usual compact and informative format. For our other co-operation partners we have developed curricula with a longer-term perspective, providing them with an overview for purposes of long-term planning.

Some of our events are in constant demand, others seek to keep pace with the latest developments. A growing proportion are “train-the-trainer” courses in which experts in search and examination can learn how best to pass on their expertise to other colleagues. For mid-level managers, we are organising an “IP Executive Summer Week” in collaboration with the Office for Harmonization in the Internal Market (OHIM) and WIPO. We are expanding the range of our distance learning courses, which provide for maximum flexibility and the distribution of individual modules over an extended period.

Our offerings for patent professionals, judges, academia and SMEs are growing too. We are arranging an ever-increasing number of internships and study visits for various professional groupings. In 2014, thanks to close co-operation with OHIM, there will be a marked improvement in the quality of our self-learning modules and manuals for the academic and business world: our successful Teaching Kit is being revamped to cover all forms of intellectual property and their management.

Leafing through this catalogue you are sure to discover other things for yourself. We hope we can satisfy your wishes and expectations and meet all your needs in the best possible way.

Richard Flammer
Principal Director Patent Information – European Patent Academy
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This seminar which falls in the learning category “patent administration and formalities”, is also suitable for participants from the beneficiaries of the integration package.

Key EPO events

Formalities Matters

References PS07-2014/OS22-2014
10-11 April 2014
EPO Munich, Germany

Content
– Overview of the life of a file, from filing through to grant and post-grant procedures
– The EPO as PCT authority in search and examination
– The administrative processing of applications and the main tools used
– Unitary patent issues
– The EPO’s online services
– Formalities at all stages of the proceedings, including examination, opposition and appeal
– Interfaces between the EPO and national IP offices

Format
– Presentations
– "At the desk" sessions
– Workshops, including specific ones for staff of national IP offices

Learning objectives
On completion of the training participants will
– have updated their knowledge of procedural law under the EPC and PCT
– understand how best practice can improve efficiency
– have a better insight into the work of formalities officers at the EPO

Requirements
Participants should preferably have some experience as formalities officers, paralegals or patent administrators.

Search Matters

Reference BC01-2014
3-4 April 2014
EPO The Hague, the Netherlands

Content
– Notorious knowledge
– Inside the mind of an EPO examiner
– The Common Citation Document (CCD) web application
– Forward searching
– Unitary of invention
– The problem-and-solution approach
– When to stop a search
– Data search: abstracts published together with patent applications vs. "enhanced" abstracts
– Searching Chinese, Indian, Korean and Russian prior art
– Finding legal status data with Global patent index
– PATSTAT online
– Searching functional features
– Access to Japanese prior art using classification and citation information

Format
– Presentations
– Workshops
– "At the desk" searches

Learning objectives
On completion of the training participants will
– have greater insight into general procedural aspects
– understand how examiners approach patent examination
– have greater insight into general procedural aspects
– have a better understanding of rare procedural occurrences
– be up to date on the latest case law developments in specific areas

Requirements
Participants should preferably have at least four years’ experience in the field of patent search.

Examination Matters

Reference PS05-2014
2-3 July 2014
EPO Munich, Germany

Content
– Oral proceedings by video conference
– Selections, lists and formulæ – where are the limits of Article 123 EPC?
– Case law on presentations of information, user interfaces and user preferences
– Unclear claims – Article 84 or Article 83 EPC?
– Late-filed submissions
– 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 conference 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
Participants should preferably have at least four years’ experience in the field of patent search.

The EPO boards of appeal and key decisions

Reference OC02-2014
October 2014 (2 days)
EPO 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
– Interlocutory revision
– 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 seminar 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 the beneficiaries of the integration package.
Key EPO events

PCT at the EPO

Reference PS06-2014
1-2 October 2016
EPO The Hague, the Netherlands

Content
– PCT filing at the EPO
– Restoration and incorporation procedures under the PCT
– PCT search at the EPO
– National phase at the SIPO
– PCT examination at the EPO
– National phase at the USPTO
– Regional phase at the EPO
– National phase at the IPO
– Key developments in the PCT

Format
– Presentations
– Workshops

Learning objectives
On completion of the training participants will
– have acquired an all-round understanding of the PCT
– be familiar with the way the EPO handles PCT applications
– understand how PCT applications are processed upon entry into the regional phase in different regional and national offices

Requirements
This event is intended for patent attorneys who have a good knowledge of the PCT.

A very good command of spoken and written English is required for all courses.
A very good command of spoken and written English is required for all courses. For updates, please check www.epo.org/learning-events

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- **Content**
  - CPC classification structure
  - Complete classification in CPC
  - Practical matters and tools
  - CPC definitions

- **Format**
  - e-learning modules
  - Virtual classroom sessions
  - Tests

- **Learning objectives**
  On completion of the course participants will
  - understand the object and purpose of classification systems
  - understand the basic structure of the CPC
  - 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 perform 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 must have
  - basic skills in search and classification

- **Content**
  - Main differences between ECLA and CPC
  - Changes in syntax
  - 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 session
  - 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 ECLA in classification (and preferably search)

- **Content**
  - Introduction to the patent system
  - Benefits of patent information
  - Basic EPO patent information products
  - Patent searching

- **Format**
  - Classroom training
  - Presentations
  - Hands-on exercises

- **Learning objectives**
  On completion of the training participants will
  - have basic knowledge of the patent system and patent searching
  - have a general understanding of patent information
  - be familiar with the EPO’s basic patent information products

- **Requirements**
  No previous knowledge of patent searching required

- **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
A systematic approach to patent searching

Reference OD05-2014
May-August 2014
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
- a basic knowledge of patent searching

EPOQUE Net searches
Intermediate level

Reference OS06-2014
18-21 March 2014
EPO The Hague, the Netherlands

Content
- Review of EPOQUE Net query language
- Commands and features
- Database access and structure
- Cluster creation
- Full-text searches
- EPO classification schemes (including CPC)
- Search concepts
- Cost monitoring

Format
- Classroom training
- Presentations
- Hands-on exercises

Learning objectives
On completion of the course participants will be able to
- use EPOQUE Net efficiently when performing searches
- be confident about using the query language, choosing the appropriate classification, selecting suitable databases and combining classification and keyword concepts
- know how to search in non-patent literature databases

Requirements
Participants should have
- completed the intermediate level “EPOQUE Net searches” course

EPOQUE Net searches, including non-patent literature
Advanced level

Reference OS28-2014
8-12 September 2014
EPO The Hague, the 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
- completed the intermediate level “EPOQUE Net searches” course
EPOQUE Net: the art of efficient searching

Reference OD07-2014
Distance learning course
Accessible online 24/7 from February 2014 until the end of the year
Live monthly virtual classroom sessions

Content
- Introduction to EPOQUE Net; getting started
- Major databases in EPOQUE Net; concepts
- Proximity operators and truncation
- Patent families
- Classification schemes, including CPC codes
- EPOQUE Net viewer
- Synonyms
- X-Full

Format
- e-learning module
- Virtual classroom sessions
- Practical exercises

Learning objectives
On completion of the course participants will
- have a good understanding of EPOQUE Net and its databases and query language
- be able to use EPOQUE Net for their searches

Requirements
Participants should have
- a basic knowledge of patent searching
- access to EPOQUE Net
- preferably, experience of using EPOQUE Net

How to understand EPOQUE search reports and written opinions

Advanced level

Reference OC09-2014
9-11 April 2014
Rome, Italy

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 the beneficiaries of the integration package.

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

Drafting search reports and written opinions

"Train-the-trainer" course

Reference OS10-2014
23-26 September 2014
Berlin, Germany

Content
- Legal basis and content of EESRs and ISRs, including ESOP and WO-ISA
- Evaluation of search results in preparing search reports and written opinions
- Relevant points in drafting EESRs, ISRs and WO-ISAs
- CPC definitions

Format
- Presentations
- Practical exercises
- Preparing/presenting a teaching module

Learning objectives
On completion of the course participants will
- have a good practical knowledge of how to draft search reports and written opinions (EP and PCT)
- understand how to transform this knowledge into a practical training course

Requirements
Experience in teaching/presenting/lecturing would be an advantage, and participants must have
- previously attended an intermediate-level course on search reports and written opinions, and/or
- at least four years’ experience of patent searching, including the use of EESRs and/or ISRs

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

We recommend combining it with OD09-2014 (distance learning course) which complements the subject-matter and is scheduled for the subsequent weeks.

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

Drafting written opinions: EESR practice at the EPO

Reference OD09-2014
September-November 2014
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 on whether the application and the invention to which it relates seem to meet the requirements of the EPC

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

We recommend combining it with OD09-2014 (distance learning course) which complements the subject-matter and is scheduled for the subsequent weeks.

For updates, please check www.epo.org/learning-events
Clarity and unity: analysis of patent applications
Reference OS08-2014
5-7 February 2014
Bratislava, Slovakia

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.

We recommend combining this course with OD38-2014 (distance learning course) which complements the subject-matter and is scheduled for April 2014.

The course is also suitable for participants from the beneficiaries of the integration package.

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

Assessing clarity and unity in patent applications
Reference OD38-2014
April 2014 (4 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 one year’s experience of searching or examining patent applications

We recommend combining this course with the entry-level course (OS08-2014) on clarity and unity (preceding this course).

Novelty and inventive step
Entry level
Reference OS09-2014
17-21 March 2014
Ankara, Turkey

Content
– Novelty: analysis of simple sets of claims and prior art
– Different types of prior art
– Different types of electronic document
– 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
– 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.

It is also suitable for participants from the beneficiaries of the integration package.

We recommend combining this course with OD39-2014 (distance learning course) which complements the subject-matter and is scheduled for May 2014.

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

Assessing novelty and inventive step in patent applications
Reference OD39-2014
May 2014 (4 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 one year’s experience of searching or examining patent applications

We recommend combining this course with the entry-level course (OS09-2014) on novelty and inventive step (preceding this course).
Clarity and unity: analysis of patent applications
Intermediate level
Reference OS11-2014
31 March-2 April 2014
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.

It is also suitable for participants from the beneficiaries of the integration package.

We recommend combining this course with the intermediate (OS14-2014) or advanced (OS15-2014) course on novelty and inventive step (immediately following this course).

Clarity and unity: analysis of patent applications
Advanced level
Reference OS12-2014
31 March-2 April 2014
Munich, Germany

Content
– Strategies and legal background for dealing with clarity, unity and sufficiency issues at the search and examination stage
– Consolidated their knowledge on dealing with clarity, unity and sufficiency issues at the search and examination stage
– Aquired and practised efficient strategies, enabling them to handle highly complicated cases and train newcomers

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
– be aware of related EPO case law
– be able to make efficient use 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
– 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 this course with the intermediate (OS14-2014) or advanced (OS15-2014) course on novelty and inventive step (immediately following this course).

Novelty and inventive step
Intermediate level
Reference OS14-2014
2-4 April 2014
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.

It is also suitable for participants from the beneficiaries of the integration package.

We recommend combining this course with the intermediate (OS11-2014) or advanced (OS12-2014) course on clarity and unity (immediately preceding this course).

Novelty and inventive step
Advanced level
Reference OS15-2014
2-4 April 2014
Munich, Germany

Content
– Review of novelty and inventive step assessment criteria
– Review of special cases, e.g. partial problems, alternative solutions, implicit features, selection inventions and feature juxtaposition/aggregation
– Related EPO case law
– Assessment of novelty and inventive step in complex scenarios

Format
– Presentations
– Group work on practical examples
– Discussion of participants’ own cases

Learning objectives
On completion of the course participants will
– be familiar with the theory and practice of novelty and inventive step assessment
– be able to make efficient use of the criteria for determining novelty and inventive step
– be able to confidently apply the problem-solution approach for assessing inventive step
– be aware of related EPO case law
– be able to deal with special cases, e.g. partial problems, alternative solutions, implicit features, selection inventions and feature juxtaposition/aggregation

Requirements
Participants must have
– attended the intermediate-level course on novelty and inventive step, and/or
– at least four years’ experience of patent examination

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

It is also suitable for participants from the beneficiaries of the integration package.

We recommend combining this course with the intermediate (OS11-2014) or advanced (OS12-2014) course on clarity and unity (immediately preceding this course).

For updates, please check www.epo.org/learning-events
Pharmaceutical inventions: classification, search and examination practice

**Advanced level**

Reference OS17-2014
24-26 June 2014
Warsaw, Poland

**Content**
- IPC/CPC classification for pharmaceuticals
- Search tools and strategies
- Databases, commands and preparations for use in EPOQUE Net
- Non-patent pharmaceutical databases
- Novelty and inventive step (based on the problem-solution approach)
- Special cases, e.g. Markush-type claims, second medical use or exclusions from patentability
- Clarity, unity and sufficiency of disclosure for pharmaceuticals
- EPO case law on pharmaceuticals

**Format**
- Classroom training
- Group work on practical examples
- Discussion of participants’ own cases

**Learning objectives**
On completion of the seminar participants will have
- a very good understanding of examination practice in the field of pharmaceuticals
- an overview of the different products and applications and the associated EPO case law and practice
- a good knowledge of the theory and practice of novelty and inventive step

**Requirements**
Participants must have
- at least four years’ experience of patent examination
- attended the intermediate-level course and/or
- at least eight years’ professional experience in search and examination in the fields of biotechnology/pharmaceuticals/industrial chemistry at a national patent office

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

Examination practice in the fields of biotech/pharma/industrial chemistry

**Expert level**

Reference OS16-2014
11-13 November 2014
London, UK

**Content**
- Complex cases relating in particular to exclusions from patentability and technical versus non-technical subject-matter
- Novelty and inventive step
- Internet publications as prior art
- EPO case law and practice

**Format**
- Classroom training
- Group work on practical examples
- Discussion of participants’ own cases

**Learning objectives**
On completion of the seminar participants will have
- advanced knowledge of special aspects of biotechnology/pharmaceutical/industrial chemistry applications and the associated EPO case law and practice
- a very good understanding of examination practice in the field, including criteria for assessing novelty and inventive step

**Requirements**
Participants must have
- attended the intermediate-level course and/or
- at least eight years’ professional experience in search and examination in the fields of biotechnology/pharmaceuticals/industrial chemistry at a national patent office

IP valuation and commercialisation:

**from ideas to business**

Reference OS21-2014
27-28 March 2014
Athens, Greece

**Content**
- IP valuation, patent pre-diagnosis and diagnosis
- IP risk management
- Damage assessment relating to infringement
- IP audit
- Business models and inventions (universities, spin-offs, SMEs, technical fields)
- Business cases and patents

**Format**
- Presentations
- Group work on practical examples
- Discussion of participants’ own cases

**Learning objectives**
On completion of the seminar participants will be aware of
- the reasons for IP valuation
- Fundamental principles of IP valuation
- IP valuation methodology: cost-based and market-based methods, income and direct approaches
- specific IP valuation: patents, trade marks and brands
- IP risk assessment for different assets (patents, trade marks, copyright)
- damage cost assessment for different forms of infringement
- IP audit: identifying, organising and reviewing a client’s IP assets and potential liabilities
- the benefits of IP audit
- approaching the consumer
- marketing an invention
- IP and bank funding
- commerce and business models

**Requirements**
Participants must have
- at least two years’ experience in the field of IPR management

This course is also suitable for participants from the beneficiaries of the integration package.

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

IP for EU and government officials: IP and globalisation

Reference OC18-2014
9-10 September 2014
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 also suitable for participants from the beneficiaries of the integration package.

It is being organised in co-operation with OHIM.
The European patent system from filing to grant
Reference OS20-2014
1-4 July 2014
Sibiu, Romania

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 Unified Patent Court

Format
– Classroom training
– Presentations

Learning objectives
On completion of the conference 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 the beneficiaries of the integration package.

A very good command of spoken and written English is required for all courses. For updates, please check www.epo.org/learning-events

Opposition procedure at the EPO
Reference OD19-2014
September-October 2014 (5 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
– know the fundamental aspects of filing opposition
– be capable of informing their public of the basis for filing opposition 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

The unitary patent and the Unified Patent Court
Reference OC17-2014
30 September-1 October 2014
Paris, France (tbc)

Content
– History of the Community patent, key success factors of the present system
– Enhanced co-operation process and the unitary patent package
– Legislation and regulations related to the unitary patent
– Requests for unitary effect and administration of a unitary patent
– Register for unitary patent protection
– Select Committee: mandate and composition
– Agreements and statute for the Unified Patent Court (UPC)
– Structure and jurisdiction of the UPC
– Envisaged rules of procedure of the UPC
– Agreements and statute for the Unified Patent Court
– Register for unitary patent protection
– Effect on the European patent, including stay of national court proceedings
– Maintenance, amendment and revocation
– Oral proceedings
– Requests for unitary effect and administration of a unitary patent
– Register for unitary patent protection
– Select Committee: mandate and composition
– Agreements and statute for the Unified Patent Court
– Structure and jurisdiction of the UPC
– Envisaged rules of procedure of the UPC
– Agreements and statute for the Unified Patent Court
– Register for unitary patent protection

Format
– Presentations
– Roundtable discussions

Learning objectives
On completion of the conference participants will be familiar with
– legislation and regulations relating to the unitary patent, in particular: requesting, validating and administering unitary patents
– the statute, structure, powers, jurisdiction and proceedings of the Unified Patent Court and its divisions
– views of other stakeholders in industry, the professional representation community and society

Requirements
Participants should have
– basic knowledge of patents

This course is also suitable for participants from the beneficiaries of the integration package.

Administration of Article 39 EPC renewal fees (post-grant)
Reference OS35-2014
21-22 October 2014
Paris, France

Content
– Data exchange between the EPO and the member states, including the legal background
– Review of Article 39 and its legal implications
– Bibliographic data of published European patents
– Format for sending fee payment and lapse information to the EPO
– Evaluation reports sent by the EPO to national offices (updated format)

Format
– Mix of theory and practice
– Interactive discussions
– Hands-on exercises

Learning objectives
On completion of the seminar participants will
– know how to interact with the EPO to fulfil a contracting state’s obligations under the EPC with respect to Article 39 post-grant renewal fees
– be aware of the latest documentation, in particular recent changes to post-grant reports

Requirements
Participants should be
– working in the renewal-fee or IT section of a national office of an EPO member state
– familiar with the EPO document “EPO post-grant data exchange format for MS”, available from postgrant@epo.org
– familiar with Microsoft Excel

This course is also suitable for participants from the beneficiaries of the integration package.

For updates, please check www.epo.org/learning-events
A very good command of spoken and written English is required for all courses. For updates, please check www.epo.org/learning-events

**Patent documentation standards: tools for data exchange and system interoperability**

Reference OS34-2014
2-4 December 2014
EPO The Hague, the Netherlands

**Content**
- International standards and relevant tools for patent documentation data exchange
- Standard exchange formats, quality issues, processing and correction of exchanged data
- Preparing documents for data exchange

**Format**
- Presentations
- Hands-on exercises
- Group discussions of participants’ own cases

**Learning objectives**
On completion of the seminar participants will
- have sufficient understanding of data exchange formats to be able to select and apply appropriate formats
- know how to apply the standards in practice, using the relevant IT tools

**Requirements**
Participants should
- be from the IT departments of their office
- have at least a reasonable knowledge of patents and international exchange standards

This course is also suitable for participants from the beneficiaries of the integration package.

**Effective communication between patent examiners and patent attorneys/applicants**

Reference OS23-2014
27-29 May 2014
Oslo, Norway

**Content**
- Basics of effective communication
- Effective written communication with attorneys/applicants
- Effective communication with attorneys/applicants in interviews and oral proceedings
- 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 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.

**External outreach activities: communication plan for IP offices**

Reference OC29-2014
December 2014 or early 2015 (3 days)
Copenhagen, Denmark

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

**Format**
- Lectures by specialists
- Group work on practical examples
- Discussion of participants’ own practice

**Learning objectives**
On completion of the seminar participants will be aware of
- the rules of customer segmentation
- good practice in awareness and outreach implementation, in particular through digital media

**Requirements**
Participants should have
- at least two years’ experience in the field of IP communication, promotion and marketing

This course is also suitable for participants from the beneficiaries of the integration package.

It is being organised in co-operation with OHIM.
<table>
<thead>
<tr>
<th>Month</th>
<th>Events</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>None</td>
</tr>
<tr>
<td>February</td>
<td>* 5-7 February Clarity and unity (Entry level) Ref. OS08-2014*  * February-March CPC for classifiers: from ECLA to CPC (Advanced level) Ref OD10-2014*  * February-end of year EPOQUE Net: the art of efficient searching Ref OD07-2014*</td>
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<tr>
<td>March</td>
<td>* 3-5 March PATSTAT: the EPO Worldwide Patent Statistical Database Ref PI01-2014*  * 17-21 March Novelty and inventive step (Entry level) Ref OS09-2014*  * 18-21 March EPOQUE Net searches (Intermediate level) Ref OD06-2014*</td>
</tr>
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<tr>
<td>April</td>
<td>* 2-4 April Novelty and inventive step (Intermediate level) Ref OS14-2014*  * 9-11 April How to understand EPO search reports and written opinions (Advanced level) Ref OC09-2014*  * 10-11 April Formalities Matters Ref OS22-2014*</td>
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<tr>
<td>May</td>
<td>* 21-22 May Searching patent documents with Global patent index (GPI) Ref PI03-2014*  * 27-29 May Effective communication for patent examiners Ref OS23-2104*  * May Assessing novelty and inventive step in patent applications Ref OD39-2014*</td>
</tr>
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<tr>
<td>June</td>
<td>* 24-26 June Pharmaceutical inventions classification, search and examination practice (Advanced level) Ref OS17-2014*  * 7-9 June How to understand EPO search reports and written opinions (Advanced level) Ref OC09-2014*</td>
</tr>
<tr>
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<tr>
<td>July</td>
<td>* 1-4 July The European patent system from filing to grant Ref OS20-2014*  * 8-11 September Patent searching for beginners Ref PI04-2014*  * 18-21 March EPOQUE Net searches (Intermediate level) Ref OD06-2014*</td>
</tr>
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</tr>
<tr>
<td>September</td>
<td>* 6-9 September EPOQUE Net searches (Advanced level) Ref OD38-2014*  * 8-12 September EPOQUE Net searches (Advanced level) Ref OS28-2014*  * 17-21 March Novelty and inventive step (Entry level) Ref OS14-2014*</td>
</tr>
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<tr>
<td>October</td>
<td>* 21-22 October Administration of Article 39 EPC renewal fees (post-grant) Ref OS35-2014*  * 21-22 October Administration of Article 39 EPC renewal fees (post-grant) Ref OS35-2014*</td>
</tr>
<tr>
<td>November</td>
<td>* 11-13 November Examination practice in the field of biotech/pharma/chemistry (Expert level) Ref OS16-2014*  * 23-25 November Assessing novelty and inventive step in patent applications Ref OD39-2014*</td>
</tr>
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<tr>
<td>December</td>
<td>* 2-4 December Patent documentation standards: tools for data exchange and system interoperability Ref OS34-2014*  * 30 September-1 October The unitary patent and the Unified Patent Court Ref OC17-2014*</td>
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<tr>
<td>November-December</td>
<td>* 21-22 October Administration of Article 39 EPC renewal fees (post-grant) Ref OS35-2014*  * 21-22 October Administration of Article 39 EPC renewal fees (post-grant) Ref OS35-2014*</td>
</tr>
</tbody>
</table>

**Target group:** staff of European national IP offices and related institutions
A very good command of spoken and written English is required for all courses. For updates, please check www.epo.org/learning-events

Target group: staff of non-European national IP offices and related institutions
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 organised by 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. Some of the modules may contain several parts that will be implemented in the form of distance learning or traditional classroom training.

In addition to these curricula, training activities that correspond to specific national or regional needs can be addressed.

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 as a distance learning course 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

For updates, please check www.epo.org/learning-events
### E2: Searching/E3: Patent search with EPOQUE Net

**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.

<table>
<thead>
<tr>
<th>Module E2.1: Patent search</th>
<th>Module E2.2: Searching in specific technical fields</th>
<th>Module E2.3: Searching, training trainers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distance learning course</td>
<td>Classroom training</td>
<td>Distance learning course</td>
</tr>
<tr>
<td>Reading a patent application, focusing on claims, description and embodiments</td>
<td>Free databases</td>
<td>Pedagogical principles</td>
</tr>
<tr>
<td>Establishing a search table</td>
<td>Non-patent literature</td>
<td>Preparing suitable examples and training materials</td>
</tr>
<tr>
<td>Collating results; analysing the results retrieved</td>
<td>Technical-field-specific databases</td>
<td>Soft skills</td>
</tr>
</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th>Module E3.1: EPOQUE Net, starter</th>
<th>Module E3.2: EPOQUE Net, sustained training</th>
<th>Module E3.3: EPOQUE Net, training trainers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classroom training</td>
<td>Distance learning course</td>
<td>Classroom training</td>
</tr>
<tr>
<td>Comprehensive introduction to EPOQUE Net and getting started</td>
<td>Proximity operators</td>
<td>Pedagogical principles</td>
</tr>
<tr>
<td>Structure of databases</td>
<td>Patent families</td>
<td>Preparing suitable examples and training materials</td>
</tr>
<tr>
<td>Query language</td>
<td>Classification, CPC codes</td>
<td>Soft skills</td>
</tr>
<tr>
<td>Support available on EPOXY</td>
<td>Viewer</td>
<td></td>
</tr>
<tr>
<td>Synonyms, other classification schemes and more truncation operations</td>
<td>Synonyms, other classification schemes and more truncation operations</td>
<td></td>
</tr>
</tbody>
</table>

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

### E4: Classification

**Courses in series E4 aim 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.

<table>
<thead>
<tr>
<th>Module E4.1: Classification, basics</th>
<th>Module E4.3: Classification, training trainers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classroom training/distance learning course</td>
<td>Classroom training/distance learning course</td>
</tr>
<tr>
<td>An introduction to patent classification (IPC)</td>
<td>Pedagogical principles</td>
</tr>
<tr>
<td>Use of classification for patent search and patent document classification for beginners (IPC or CPC)</td>
<td>Preparing suitable examples and training materials</td>
</tr>
<tr>
<td>Overview of CPC</td>
<td>Soft skills</td>
</tr>
</tbody>
</table>

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.
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 explains 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 other 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.

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.

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

A basic module comprises open-access e-modules on 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, and also includes classroom training. More advanced modules introduce the EPO patent information services for expert users. Complementary modules are intended to train users in professional use of Espacenet, the European Patent Register and the Global patent index. These can take the form of either classroom training or webinars.

Module E7.1: The European patent grant procedure
Distance learning course
European patent
Unitary patent

Module E7.2: The boards of appeal of the EPO
Classroom training
Guidelines/manuals
Internal procedures
Quality assessment

Module E7.3: Quality assurance
Distance learning course
Functioning and internal organisation of the EPO’s boards of appeal
EPO case law

Module E7.4: Data exchange standards
Classroom training
IT standards
Standard exchange formats
Processing, corrections
Preparing for data exchange

Module E7.5: The EPO as ISA and IPEA
Distance learning course
Procedure before the EPO as ISA
Supplementary international search
The EPO as IPEA
Euro-PCT procedure before the EPO

Module P1.1: The basics of patent information
Classroom training/distance learning course
Introduction to patent terminology
The patent grant system
EPO patent information products
Tutorials on Espacenet and the European Patent Register

Module P1.2: EPO patent information products for experts
Distance learning course
Searching patent information services for experts
Asian patent information
EP bulletin
Global patent index (GPI)
Legal status data
Using PATSTAT

Module P1.3: Becoming an Espacenet and European Patent Register expert
Classroom training
Structure and layout of Espacenet
Search options
Sorting and sharing results
Smart search
Searching with CPC
Common Citation Database (CCD)
Machine translations
Procedural and legal status data

Module P1.4: Becoming a Global patent index and European Patent Register expert
Classroom training/distance learning course
Structure and layout of Global patent index (GPI)
Search options
Customising GPI
Machine translations
Search strategies

Module E7.4: Data exchange standards
Classroom training
IT standards
Standard exchange formats
Processing, corrections
Preparing for data exchange

Module E7.5: The EPO as ISA and IPEA
Distance learning course
Procedure before the EPO as ISA
Supplementary international search
The EPO as IPEA
Euro-PCT procedure before the EPO

Module P1.1: The basics of patent information
Classroom training/distance learning course
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Tutorials on Espacenet and the European Patent Register

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Search options
Sorting and sharing results
Smart search
Searching with CPC
Common Citation Database (CCD)
Machine translations
Procedural and legal status data

Module P1.4: Becoming a Global patent index and European Patent Register expert
Classroom training/distance learning course
Structure and layout of Global patent index (GPI)
Search options
Customising GPI
Machine translations
Search strategies

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

For updates, please check www.epo.org/learning-events
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 on political level and as an important factor in creating business strategies and synergies.

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

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

These courses can be implemented as classroom or web-based training and are intended to develop skills and build capacities at national IP offices, in particular:

- training trainers in using three particular products developed by the EPO: Espacenet, Global patent index and the Patent Teaching Kit, for patent 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.

Module P2.1: Patent information and clean technologies
Classroom training
Overview of CPC
The Y section
Searching the Y02 scheme
Interpreting search results

Module P2.2: Patent information and smart electrical grids
Classroom training
Overview of CPC
The Y section
Searching the Y04S scheme
Interpreting search results

Module P3.1: Training Espacenet trainers
Classroom training/distance learning course
Pedagogical principles
Detailed review of functionalities
Delivery methods and media
Tutored exercises

Module P3.2: Training Global patent index trainers
Classroom training/distance learning course
Pedagogical principles
Search strategy
Search options in GPI
Patent information tools in patent information services for experts
Procedural and legal status data

Module P3.3: Training trainers in promoting the Patent Teaching Kit
Distance learning course
Pedagogical principles
Structure of the teaching kit
Preparations
Examples

Module P3.4: Training ip4inno trainers
Classroom training/distance learning course
Pedagogical principles
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

Module P3.5.1: Training trainers on pre-filing searches and consultancy services for local IP centres
Classroom training/distance learning course
Pedagogical principles
Tutored reflexions on:
Pre-filing searches
Informative search report
Consultancy on licensing

Module P3.5.2: Pre-filing searches and consultancy services for local IP centres
Distance learning course
Pre-filing searches
Informative search report
Consultancy on licensing

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

For updates, please check www.epo.org/learning-events
<table>
<thead>
<tr>
<th>Module</th>
<th>Description</th>
<th>Level</th>
<th>Course Type</th>
<th>Duration</th>
<th>Ref.</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Module P1.1</strong></td>
<td>The basics of patent information</td>
<td>Entry level</td>
<td>Classroom training</td>
<td>Q1/four days</td>
<td>Ref. NT11-2014</td>
<td>Participants should have a basic knowledge of the patent system.</td>
</tr>
<tr>
<td><strong>Module P1.2</strong></td>
<td>EPO patent information products for experts</td>
<td>Intermediate level</td>
<td>Distance learning course</td>
<td>Throughout the year</td>
<td>Ref. VC1ff.-2014</td>
<td>Participants should have a basic knowledge of the patent system.</td>
</tr>
<tr>
<td><strong>Module P1.4</strong></td>
<td>Becoming a Global patent index and European Patent Register expert</td>
<td>Intermediate level</td>
<td>Classroom training</td>
<td>Q3/two days</td>
<td>Ref. VCTff-2014</td>
<td>Participants should have prior knowledge of patent search, preferably with GPI.</td>
</tr>
<tr>
<td><strong>Module P3.1</strong></td>
<td>Training trainers on pre-filing searches and consultancy services for local IP centres</td>
<td>Advanced level</td>
<td>Classroom training/distance learning course</td>
<td>3 February-7 March</td>
<td>Ref. ND08b-2014</td>
<td>Participants should have some experience in IP teaching and good knowledge of the patent system.</td>
</tr>
<tr>
<td><strong>Module P3.2</strong></td>
<td>Pre-filing searches and consultancy services for local IP centres</td>
<td>Intermediate level</td>
<td>Distance learning course</td>
<td>10 March-30 May</td>
<td>Ref. ND08b-2014</td>
<td>Participants should have a good knowledge of the patent system.</td>
</tr>
<tr>
<td><strong>Module P3.3</strong></td>
<td>Training trainers in promoting the Patent Teaching Kit</td>
<td>Intermediate level</td>
<td>Distance learning course</td>
<td>Q1 ff./twelve months</td>
<td>Ref. ND20-2014</td>
<td>Participants should have teaching experience and possess a copy of the Patent Teaching Kit.</td>
</tr>
</tbody>
</table>

**All events at a glance**

Target group: staff of non-European national IP offices and related institutions
Target group: 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 e-learning courses on the EQE pre-examination and main examination papers, for both candidates and potential trainers. 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. As of 2014, our training programme covers the pre-examination and Paper C for the main examination.

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.

The EQE online forum is the first point of contact for candidates in need of information. In 2014, more EQE-type questions relating to different examination papers and exercises on more general topics will be provided in the form of a computer-based self-testing and learning programme.

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.

Online training will also be offered to formalities officers, following the same scheme as for the EQE: a mix of reading materials, self-assessment exercises, assignments and virtual classrooms. A conference is planned to provide direct interaction between formalities officers working in private practice, industry and at the EPO and help them to learn about best practices (see page 6).

The “oral proceedings” workshop will be held four times in 2014. 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 seminar, examiners will present 25 different interactive workshops covering all aspects of the procedures (see page 7).

For those wishing to deepen their knowledge of the PCT, the Academy again intends to organise the “PCT at the EPO” conference, which proved extremely successful on its inception in 2013 (see page 8).

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.

The Praktika Intern programme breaks down into three modules, to cover both trainees with little or no experience of the European patent granting process and those with years of experience in the profession. The trainees in module 1 spend three intensive weeks in a classroom environment, working on materials similar to those used to train new EPO examiners. In modules 2 and 3 the trainees work as interns under the supervision of an examiner and of a member of the boards of appeal, respectively.

EQE pre-examination and Paper C courses
- 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

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.eqe-online.org/pre-exam/course

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
- EQE wiki
- Newsletter

www.eqe-online.org

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.eqe-online.org/CSP

“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
- Debriefing on case studies

Praktika Intern
- Classroom training on the EPC
- Procedural law and patent practice at the EPO
- Search tools at the EPO
- Classification matters at the EPO
- Internship with examiners
- Internship with members of the boards of appeal

www.eqe-online.org/CSP

www.eqe-online.org

www.eqe-online.org
Target group: judiciary
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.

In early 2013, the Agreement establishing the Unified Patent Court 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 future, the classical European patent. The current system of litigation on national level will however remain in place for the foreseeable future.

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 on different levels of difficulty to cater to the judges’ experience levels in patent litigation or specific requests.

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 helping judges to attend conferences of interest (for example the boards of appeal conference, see page 7) with varying target audiences.

**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
- Observing oral proceedings

**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**

- 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
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 technical innovation, much of which could be susceptible to patent protection and commercialisation, in addition to the creation of scientific knowledge. 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 users even 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 rudimentary 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 technical universities and to train professors, teachers and staff of business studies. It aims to reach students across all faculties, including science and engineering and business studies. It aims to reach students across all faculties, including science and engineering and business studies.

Academy services
- IP rights training for specific audiences, for policy-makers or decision-makers, or representatives of associations.
- 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 (p. 54 ff).
- 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 and awareness kit - example

Introduction to the IP teaching and awareness kit and the IP course design manual

“Protect your ideas” lecture

Understanding patent claims

Round table: teaching IP rights issues in a specific country

A lecturing experience with the IP teaching and awareness kit

Searching for patents

Academy services
- Annual show-case conferences 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 56).

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
- Case study - example of an SME’s use of IP
- Enterprise Europe Network (EEN) - example
- Three-day winter school for members of the EEN practice
- IP Helpdesk service
- Patent information for business decision-making
- Open innovation
- Practicals exercises and case studies
- Building a business
- Patent searching - practical class
- Practical exercises and case studies
- Case study

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 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
The European Patent Academy, in association with the EU’s Office for Harmonization in the Internal Market (OHIM), will launch a comprehensive set of teaching materials on IP (including patents, trade marks, copyright, design and trade secrets). It provides a series of self-explanatory modules that can be used to develop IP training, with teaching notes and ready-made presentation material. Most of the modules also contain exercises and case studies to demonstrate the relevance of the topics in practice. Also, to entice sceptical audiences to take interest in IP, there will be a range of appetisers and online material.

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 will enable targeted information to be given to a wide range of different audiences, 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 Academy in 2010 (and now with over 6,000 copies in circulation). It contains the tools and information to deliver a one- to two-hour lecture on the role of IP.

Other modules of the IP teaching and awareness kit will successively appear in the course of 2014/2015, together forming one of the most complete teaching resources on IP in the world. It is offered free of charge for non-commercial use.

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

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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 curricula 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.
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](http://www.epo.org/ip4inno) to find out how to get access.

The modules at a glance

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<td>Using copyright &amp; &quot;soft&quot; IP in business</td>
<td>Practical workshop on Espacenet</td>
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<td>IP commercialisation</td>
<td>Enforcement of IP rights</td>
<td>IP issues for three very different sectors: &quot;creative&quot; industries, ICT and software, and biotechnology</td>
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<td>Business planning around IP</td>
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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 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 and awareness 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**


**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](http://www.epo.org/case-studies) to find out how to get your copy.