




Certification of Patent Information Professionals



Background and History



Why certification is needed!

-  To ensure professional standards are met
(IPR knowledge, search & analysis skills and code of conduct)
-  Recognition and protection of the patent information profession
-  To build career opportunities and attract newcomers to the profession



Aims of the Certification Project

- Q^{PIP} To identify the **requirements for being certified** as a professional patent searcher
- Q^{PIP} To create a **certifying body**
- Q^{PIP} To develop **examination papers** reflecting the skills needed
- Q^{PIP} To review possibilities & need for **training**



A long history...

October 2002
Idea of certification
at EPIDOS meeting

October 2011
Mock exams

2017
Second version
Articles & Rules for
public feedback

2002

2009

2011

2015

2017

2018

May 2009

Start collaboration
PDG, CEPIUG and
PIUG on certification

2015

First version
Articles & Rules for
public feedback

2018

Articles & Rules finalised.
**ISBQPIP officially
established**



ISBQPIP

(International Standards Board for Qualified Patent Information Professionals)

Professional Representatives Collegium
representing organisations involved

Supervisory Council

(includes Chairperson, Vice Chairperson, Secretary, Treasurer)

Accreditation
Committee

Examination
Committee

Qualifications
and
Continued
Professional
Development
Committee

Regulatory
and
Disciplinary
Committee







Prior Experience Recognition



Prior Experience Recognition






Why?

-  To recognize people's experience and commitment
-  To give credibility to the organization
-  To follow the example of other professions
-  To form a pool of volunteers



Prior Experience Recognition





How?

-  Apply for PER status according to Rule 18 (also see example form)
-  Continued Professional Development (5 points for the past year)
-  Willingness to contribute to activities of ISBQPIP
-  Commitment to the Code of Conduct
-  Application fee of € 175



Continuous Professional Development




Why?

-  To ensure continuous quality (being up-to-date)
-  To prove high standards to your customers
-  To follow the example of other professions
-  To comply with the Code of Conduct



Continuous Professional Development

How?

-  Complete any of the activities outlined in Rule 23.7
-  Keep a record of the activities
-  Be prepared to be randomly audited



Searcher working for a company without travel allotments	CPD 12 pts	Independent searcher	CPD 11 pts
Attending remotely or in person an internal training course or meeting relating to patent information or scientific, engineering or technical training lasting ½ day or longer.	2	Attending a half-day web workshop on new release version and best use of a search tool provider.	2
Attending remotely or in person an internal presentation on patent information developments lasting up to ½ day.	2	Reading an article on search strategies in a journal.	1
Evaluation and preparing a report or presentation of new patent information tools for retrieval or analysis.	2	Reading a blog post on patent information analysis	1
Attending remotely or in person a patent information vendor webinar.	1	Participating (or remotely reviewing) in a national patent user group meeting one day seminar focusing on FTO search considerations.	3

Searcher working for a company without travel allotments	CPD 12 pts	Independent searcher	CPD 11 pts
Attending remotely or in person a half day internal meeting with vendors.	1	Following and reviewing the EPO “East Meets West” seminar via the e-learning web program on how to access and search Asian patent information.	2
Internal peer review of patent related search reports.	1	Attending a vendor webinar on a visualization tool.	1
Reading 3 books, journal articles, conference papers, conference proceedings or online forums such as law blogs relating to patent law, patent information retrieval or patent information analysis.	3	Reading and reviewing presentations from EPOPIC on outsourcing routines within companies.	1

QPIP Examination







Examination Objective

To test whether a candidate has the knowledge to give any client (including those with no specific patent knowledge) the correct, fit-for-purpose information.



General Comments

-  Examination will be conducted in English.
-  Held over two days (8 hours each day) in a controlled testing environment.
-  Day 1=search paper (with Internet access)
 - Password access to different patent databases is planned.
-  Day 2=analysis paper (no Internet access)



Proposed Examination Structure

Day 1 of Exam (Search)

Part 1 (4 hours)

- Conduct a patentability, validity or opposition search

Part 2 (4 hours)


- Conduct a patent infringement risk search


For both parts, candidates choose between two different fact scenarios provided and **the majority of marks will be for the search strategy rationale rather than the actual results obtained by the search**



Proposed Examination Structure

Day 2 of Exam (Analysis)

-  Part 1 (1 hour) – focus on applied patent knowledge
- Review mini-fact scenarios and answer questions on patent legal status (e.g. national phase entry, validation, reissue, expiration)

-  Part 2 (3 hours) – focus on either infringement or novelty/validity
- Categorise a set of patent and/or non-patent documents in a technology neutral field to inform the client about which documents are of interest, may be of interest or not of interest from either a novelty/validity **OR** patent infringement risk perspective and explain the reasons why



Proposed Examination Structure

Day 2 of Exam (Patent Landscape Analysis)

Part 3 (1 hour) – focus on theory

- Review mini-fact scenarios and answer questions on aspects of patent landscape searching (e.g. how to define the breadth, which info sources should be included, data cleaning techniques)

Part 4 (3 hours) – focus on reporting

- Review a data set of approximately 100 patent families relating to a technology neutral field in order to prepare a report to the client which will include a statement about the inherent limitations of the data set and the assumptions made by the candidates in arriving at their conclusions.



Why is this structure being proposed?

Need to address “gaps of knowledge” such as:

- using an incorrect date limitation for a search;
- misunderstanding patent claim language; or
- confusing patent infringement risk searching with a patent landscape searching



Definitions

Patent Infringement Risk Search

... searching for and evaluating granted patents that are still in force, or pending patent applications or patents and patent applications that can be revived in the jurisdiction of interest that claim one or more of the features of a proposed product or process.

Patent Landscape Search

... is searching for, evaluating and analysing a large set (typically > 100) of granted patents and/or published patent applications and/or documents related thereto for the purpose of deriving insights from the general direction in which patent metrics are developing or changing in order to support policy, business, and research/development decisions



Questions & Answer Session

