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with modifications as proposed by the CEPIUG**

**CERTIFICATION OF PATENT INFORMATION SPECIALISTS:
THE PDG-CEPIUG PROPOSAL**

INTRODUCTION

We believe that an official certification for patent information specialists is an indispensable tool for guaranteeing that the patent searching profession is able to continue meeting the quality standards of European industry, and for providing recognition for people working as patent information specialist and for new entrants in the profession.

The establishment of an official certification implies achieving an agreement:

- a title identifying the profession, that can be used to generate an acronym;
- a short (max 40 words) but informative definition of the profession; and
- the required skills and knowledge.

Two preliminary proposals for the title and definition of the profession have been elaborated:

- CPIA =Certified Patent Information Analyst
“A specialist in the retrieval and the analysis of scientific, technical, business, and legal information that is relevant for establishing the knowledge and legal status in the field of patents, according to main legislation worldwide”

Certification is not intended as a substitute for the many years of experience needed to become an expert in this field: rather, it is best viewed as a sort of “driving license” for relatively new entrants in the profession, to make sure their skill levels meet the basic needs of the European industry, much the same as in the case of the European Qualifying Examination (EQE) for European patent attorneys. In this view, an official certification scheme, administered by an international organization, has the potential of representing a fundamental step in the right direction.

After having completed a thorough review of previous documents and certification proposals prepared by various European and foreign organizations, the PDG and CEPIUG propose that a professional certification for patent information professionals in Europe should be structured along the following lines:

1. Grandfathering

The certification should be obtainable through examination only. The certification itself is of course fully optional, in the sense that it is not necessary to become certified in order to work as patent searcher (differently from what happens in the case of patent attorneys).

In addition, many people already working in the profession request some kind of acknowledgement for experienced patent information specialists who are not willing or not in a position to do the examination for certification. This recognition can be based on different criteria for assessing past experience in the search and the analysis of technical and scientific information in the field of Intellectual Property such as:

- Public presentations or publications;
- Regular participation in meetings and conferences;

- Membership of professional associations; and/or
- Testimonials from patent attorneys or managers with whom the professional has worked.

This type of official recognition is not meant to be equivalent to the certification discussed in this document, and will be subject of a separate discussion.

2. Examination body

The examination should be administered by an independent international organization comprising people working in the profession and preferably supported and endorsed by patenting authorities such as the EPO and other related professional organizations such as *epi*.

Examination committees should comprise patent information experts from industry, patent offices, and possibly also representatives from academia and the patent attorney profession.

A reasonable examination fee should be set by the body administering the examination.

3. Requirements for admission

In principle same as applied for enrolling in the European Qualifying Examination (EQE) for European patent attorneys, i.e. at least a BSc (or equivalent) in a scientific discipline plus 3 years experience, otherwise at least A-levels (or equivalent) plus 10 years experience. (Please check with the EPO as these regulations may change.)

However, this needs to be looked into in more detail later and will be subject of a separate discussion and probably requires specification per country. People who do not meet the basic requirements could e.g. be assessed by an examination committee or do an admission test.

4. Examination papers

The examination should consist of two different papers:

- Paper A: this paper consists in an **online search/practical test** and could be structured in a similar way to the Patent Information Search Contest that was organized by AKPIC and INFOSTA in Japan (Osaka, 2007), with some adjustments to make it viable in a European context. This paper should be made available in at least four different technical subjects: mechanics, electricity/electronics, chemistry, life sciences. This is rendered necessary in order to prepare exam papers of adequate complexity. Paper A examination should require Internet/database access in order to assess the proficiency in search skills (the type/number of tools and databases to be made available during the examination will be defined later)
- Paper B: this paper consists of an **analysis test** and could be set up by providing a set of full-text documents to candidates asking them to propose a reasoned selection and comparison of such documents in relation to legal/strategic questions (i.e. validity, freedom-to-operate, analysis of competitors, etc.). Giving legal opinions should be avoided, to distinguish the different professional skills/tasks of patent information specialists from those of patent attorneys. Later discussions should define if this paper should be
 - set up to test the ability of candidates to handle patent documentation in languages other than English (e.g. any of the three official EPO languages).
 - provided in different technical subjects or the same for all technical subjects, as its focus would be more on the analytical skills rather than on the purely technical ones.

The examination papers need to be further specified regarding

- Any possible evaluation of the skills in the search and analysis of trademarks or designs;

- The language of the papers (e.g. at least the three official EPO languages), to allow the candidates e.g. providing the answers in the language most comfortable to them;
- The extent to which legal knowledge is tested, especially regarding the kind of judgments that patent information specialists are allowed to make without having the legal background knowledge that is required to a patent attorney.

5. Examination committees

The examination papers should be duly prepared in advance by the examination committees and with the same level of detail required for the preparation of the EQE papers. Detailed Examiner's Reports should also be prepared and distributed after the examinations.

Members of the examination committees cannot be involved as teachers in training courses aimed at preparing candidates in view of sitting the examination.

6. Way forward

Through this document we have proposed an agreed general structure for certification by examination. Next steps should be:

- a) Establish the title and definition of the profession that is associated to the certification/examination scheme
- b) Get support for examination from the profession (e.g. at PDG Annual Meeting, EPIC, IPI-ConfEx and meetings held by national user groups).
- c) Develop sample examination papers - and get colleagues to "sit" it;
- d) Develop marking schemes;
- e) Get this sample examination approved/certified by an international examination body, which has to be formed in the mean time.

Only after the above steps are completed, it will become possible to set the first exam and mark it. In parallel other organizations, e.g. EPO or *epi*, will be kept informed and their support and endorsement will be sought.
