



Minutes of the 5th meeting of CEPIUG, Lisbon 7th March 2010

List of attendees:

Aalt van de Kuilen	Chair	WON
Bob Stembridge	Secretary	PATMG
Anne-Gaëlle Darmont	representative	CFIB
Jane List	representative	PATMG
Joni Sayeler	representative	SIPIG
Gerben Gieling	representative	WON
Malene Jensen	representative	PIF
Bettina de Jong	observer	WON
Stephen Adams	observer	PATMG
Daniel Shalloe	observer	EPO
Edlyn Simmons	observer	PIUG
Lucy Akers	observer	PIUG
Theo Verbeij	observer	GO
Ford Khorsandian	observer	IPI

AGENDA:

1. Apologies for absence
2. Approval of minutes from November 5th meeting
3. Matters arising
4. Developments at CEPIUG since the last meeting
5. Update on Certification/Examination
6. A.O.B

Due to unavoidable circumstances, the secretary was not present for the first part of the meeting up to agenda item 4 i) inclusive and is grateful to Anne-Gaëlle Darmont for her notes for the minutes of this portion.

- 1) The meeting opened at 4.00 pm. Apologies for absence were received from Linus Wretblad, Ruth Mikeska, Michele Fattori, Philippe Bodart, Tine Mikkelsen, Guido Moradei, Marcel Rödder and Peter Atzmüller.
- 2) Minutes from the meeting of November 5th 2009 were approved without amendment.

.....

- 3) Aalt van de Kuilen reported that the IRF survey about patent searching received 90 responses. The results of the survey will be presented at next PIUG meeting in Baltimore and distributed to User Groups.

The poster session at IPI-ConfEx 2010 will be a poster on CEPIUG evolution over the last year presented by Anne-Gaëlle Darmont. Thanks to Anne-Gaëlle and Michele Fattori for their work in preparing this poster.

- 4)
 - i) Aalt van de Kuilen reported on a request received from IRF for endorsement by CEPIUG (through the use of the logo and name) of their 2010 IRF Symposium. As there were some questions about the status of IRF, the request was submitted to the User Groups. Most had no problem with this proposal. Endorsement was therefore approved.
 - ii) An invitation has been received from WIPO to participate in training activities. This is within the framework of the project to establish Technology and Innovation Support Centers (TISCs) announced by WIPO earlier this year. Edlyn Simmons indicated her willingness to participate. Aalt van de Kuilen also offered to deliver the first training and Stephen Adams to do the next training after that. It was noted that it is important to understand the program planned over the next two years.
 - iii) There was some discussion about what should constitute observer status at CEPIUG meetings. It was suggested that it is not clear in the regulations who should be afforded observer status. Stephen Adams suggested that the CEPIUG board be given the power to invite observers based on the agenda items for a specific meeting. It was pointed out that rules already exist and that observers must be listed on the web-site.
 - iv) Board elections will be conducted at the next CEPIUG meeting in Lausanne.
 - v) The Training and Education working group currently comprises 2 people. Aalt van de Kuilen suggested that membership of this WG could be broadened by inviting CEPIUG member user groups to provide one representative each for this working group.

ACTION: Invitations will be sent out accordingly in conjunction with invitations for candidates to be appointed to the CEPIUG board in advance of the next meeting.

- vi) It was reported that encouraging news regarding funding had recently been received from Stichtung GO. This organisation is now not-for-profit and is actively seeking to fund projects pushing the information profession forwards (not specifically patents) on submission of a business case providing details of a business plan and expected costs. Funding of €50,000 is available. CEPIUG has submitted a business case has been submitted and this will be considered at the next meeting of GO.

Lucy Akers commented that funding for certification would in due course be provided by revenue from exam fees, but would need initial funding, possibly by donation, and asked whether any other organisations had been approached. Stephen Adams had discussed European funding with Jacques

Michel – he said he was still in touch with Alan Pompidou & maybe able to leverage that contact. Joni Sayeler has also heard that funds associate with the ERASMUS scheme are available in Sweden for setting up user groups.

Daniel Shalloe reminded the meeting that, in his personal view, the EPO would be willing to support the certification initiative through, for example, provision of meeting rooms and exam facilities (as they have already done with greatly appreciated supply of meeting rooms at EPO Patent Information Conferences). This would best be realized by correspondence from CEPIUG to EPO Director (check position) Richard Flammer requesting EPO support in this way.

Edlyn Simmons commented that, in the US, the patent bar exams used to take place around the US on the same day. They have now switched to doing this online, and believe it's not done at the same time. Bettina de Jong replied that there had been discussion of the possibility of conducting exams online within working group, but that this was not the way to go at first. Lucy Akers indicated her support of this position commenting that it would be simpler to conduct examinations on one day in several locations.

- 5) Bettina de Jong provided an update on progress of activities within the Certification working group.

The group started work on the practical aspects of the exam last May and shortly decided to conduct mock examinations with a group of volunteers. Invitations for volunteers had gone out and by September 2009, 30 people had responded as reported at the CEPIUG meeting in Biarritz.

The current plan is to conduct exams in 3 or 4 areas:

- Chemistry
- Engineering (in general, not just mechanical)
- Biotechnology
- Possibly computing science

There was discussion of whether these areas should be further sub-divided, but it was decided that questions within each area should be phrased so anyone in that area can answer (so no further split into, for example, polymers within the Chemistry area).

It was further decided that the exams should test patent information specialist skills in two areas:

1. Paper A – Search skills
2. Paper B – Selection and analysis

Coordinators have been appointed for each group to ensure the groups are aligned. Proposals for the areas and skills to be tested have been sent out and feedback obtained. The feedback included comment concerning practical considerations about which skills can actually be effectively tested. As a result, for both papers, it is most likely that two cases will be tested:

- Paper A – (Novelty or Opposition) and Freedom to Operate
- Paper B - Novelty and (Freedom to Operate or Opposition) analysis

For both of these, a full day would be required (although it was noted that this is still much shorter than EP bar exams).

These ideas are in development. There are cases developed and some have questions developing. One group is ready – others are halfway. As a general principle, it will be very important not just to do the search and analysis but to explain what has been done and why.

Bettina de Jong summed up activities by saying that a lot of progress been made and that the next step is to ensure consistency across groups regarding the number of questions, etc. Alignment between the groups is expected by the end of April.

A parallel initiative to consider regulation of certification is also in progress. A small group is discussing the organizational structure for certification body which they are looking to model on that in place for the European Attorney exam board. Approval is being sought to use parts of this document and an offer from the EPO has been received to help write this.

The plan is to send a draft proposal to the CEPIUG member groups for review, discussion and comment. This would comprise regulations concerning the conducting of exams including:

- Duties
- Fees
- Language
- Appeal process

One major point for discussion will be around the structure of the Certification Body and the elements of which this might be comprised (Exam Board, Certification Board, Supervisory board etc.). The current thinking is that the Information Profession will have a major role on the board, so it is anticipated that there would be a major input of PDG and CEPIUG to the Supervisory board. Lucy Akers indicated that PIUG would be very keen to participate in this and form part of the boards. Decision is open on this and the subject is still open for discussion. Stephen Adams recommended that steps should be taken to try and involve Japan as the third wing of the tri-lateral authorities in this as well. It was noted that Michele Fattori has strong contacts in Japan and that a certification scheme does already exist in Japan, but of a somewhat different nature.

On behalf of PIUG, Lucy Akers agreed that there is a need to unify to produce a global system. She commented that there is currently no independent activity on setting up exams within PIUG. There has been some initial work done on looking at regulations. PIUG would welcome the invitation to participate in CEPIUG/PDG WG initiative and are ready to participate and help with this.

Edlyn Simmons reminded the meeting that PIUG would like to have recognition for sub-level of profession also. The current CEPIUG proposal would satisfy the highest level of certification but PIUG would like to look to extend this to a lower level (e.g. librarian level). She added that PIUG think they can work within the proposed framework provided the questions can be graded to include 3 levels:

- Basic

February 4, 2011

Page 5

- Novelty
- Freedom to Operate

Lucy Akers indicated she would be willing to contribute to the regulation side when it's close to being a reasonable draft.

Bettina de Jong concluded by reminding the meeting that this work is being conducted by volunteers and it is not possible to set concrete deadlines, but that much progress had been made.

Aalt van de Kuilen responded by saying that the final goal is to achieve a global certification system and this was good start. On behalf of CEPIUG, he gave a vote of thanks for all the hard work done by the committee.

- 6) The next meeting of CEPIUG will be held during the EPO Patent Information Conference in Lausanne from 18th to 21st October 2010.

There being no further business to discuss, the meeting closed at 6:00 p.m.