



# Minutes of the 8<sup>th</sup> meeting of CEPIUG, Kilkenny 18<sup>th</sup> October 2011

## List of attendees:

<i>Aalt van de Kuilen</i>	<i>Chair</i>	<i>WON</i>
<i>Bob Stembridge</i>	<i>Secretary</i>	<i>PATMG</i>
<i>Guido Moradei</i>	<i>Representative</i>	<i>AIDB</i>
<i>Bart Lindekens</i>	<i>Representative</i>	<i>BEPIUG</i>
<i>Frederic Baudour</i>	<i>Representative</i>	<i>CFIB</i>
<i>Philippe Bodart</i>	<i>Representative</i>	<i>CFIB</i>
<i>Cecile Besson</i>	<i>Representative</i>	<i>CFIB</i>
<i>Peter Philip Holck</i>	<i>Representative</i>	<i>PIF</i>
<i>Susan Bates</i>	<i>Representative</i>	<i>TSUG</i>
<i>Steve Royle</i>	<i>Representative</i>	<i>TSUG</i>
<i>Theo Verbeij</i>	<i>Observer</i>	<i>GO</i>
<i>Ian Sinclair</i>	<i>Observer</i>	<i>IPI</i>
<i>Monika Hanelt</i>	<i>Observer</i>	<i>PDG</i>
<i>Bernd Wolter</i>	<i>Observer</i>	<i>PDG</i>

## AGENDA:

1. Apologies for absence
2. Approval of minutes from March 6<sup>th</sup> 2011 meeting
3. Matters arising
4. Board elections – nominations for candidates are invited
5. Developments at CEPIUG since the last meeting:
  - a. Activities of the Confederacy
  - b. Training and Education WG
  - c. Update of member group activities
6. Update on Certification of Patent Information Professionals
7. A.O.B.

## Invited Attendees:

### Members:

AGM	Arbeitsgruppe Elektronische Medien in der Patentinformation (DE)
AIDB	Associazione Italiana Documentalisti Brevettuali (IT)
BEPIUG	Belgian Patent Information users group
CFIB	Club Francophone d'Information Brevet (FR)

.....

PATMG	Patent & Trademark Group (UK)
PIF	Patent Information Forum (DK)
SIPIG	Swedish usergroup (SE)
TSUG	Thomson Reuters UK user Group (UK)
WON	Werkgemeenschap Octrooi-informatie Nederland (NL)

- 1) Aalt van de Kuilen welcomed the meeting at 13.35. Apologies for absence were received from Anne-Gaëlle Darmont, Gerben Gieling, Michele Fattori and Marjolaine Thulin. Bernd Wolter sent notice that he would join the meeting later.
- 2) Minutes from the meeting of March 6<sup>th</sup> 2011 were approved with one minor correction to the spelling of Bart Lindekens name.
- 3) No matters arising beyond those discussed below
- 4) Under CEPIUG rules whereby Board members are elected for a time period of three years after which they must resign (although they may serve a second consecutive term if nominated and elected), Aalt van de Kuilen stepped down from the Chair and Bob Stembridge was appointed temporary Chair. Aalt van de Kuilen was nominated as Chair for a second term and was duly elected and resumed the position of Chair of CEPIUG. An additional nomination was received from SIPIG for Linus Wretblad to serve on the board which was accepted and Linus Wretblad was duly appointed as CEPIUG board member.

Guido Moradei reminded the meeting that other nominations to the board are welcome and it would be desirable to have one from each user group. Aalt van de Kuilen confirmed that current regulations do not stipulate a maximum size for the board, but this would have to be reviewed if we get more than one nomination per member group.

## 5) a) Activities of the Confederacy

Aalt van de Kuilen provided an overview of CEPIUG activities during the period (Mar – Oct 2011) since we last met:

- **WIPO seminar- Tbilisi, Georgia, from September 13 to 15, 2011.**

Contribution from Bob Stembridge Chair of PATMG: speaker for presentations on:

- Search Tools and Strategies
- Using patent classification for searching, in particular the International Patent Classification (IPC)
- General Overview of Patent Databases
- General Overview of Non-Patent Literature Search Services

Contribution from Philippe Gorry, member of the CFIB : speaker for presentations + practical sessions on:

- Patent Search Strategies and Techniques: Using Espacenet

- Patent Search Strategies and Techniques: Using USPTO's PatFT/AppFT and JPO's IPDL
  
- **Mock examinations:**
  - 5 October  
London 9, Rijswijk/Den Haag 13, München 14, Stockholm 7
  - 6 October  
London 9, Rijswijk/Den Haag 13, München 13, Stockholm 7
  
  - Europe 46, most doing both paper A as B  
There are 21 for Engineering and 25 for Chemistry.
  
  - 13 October New Brunswick (New Jersey) 12
  - 14 October New Brunswick (NJ) 12
  - All 2 papers, and 6 for each technical area.
  
- **EPO IT hearing on March 31st 2011 in Rijswijk**  
Future IT developments hearing for representative bodies  
Stream 2: Improve search tools How might the internally/externally available search services for the mutual benefit of users be further developed, while progressively delivering new patent information and documentation services?
  
- **Quarterly calls with PIUG**  
Quarterly Call between Tony Trippe (PIUG) and Aalt van de Kuilen (CEPIUG) to exchange ongoing topics
  
- **Progress report to PIUG annual meeting:**  
Presentation at PIUG meeting about Certification/Examination on May 24th, 2011
  
- **Patinfo- Ilmenau**  
9-10 June 2011: Presentation: Update on Certification
  
- **Convening of Training and Education working group**  
Set-up October 3rd 2011

#### **b) Training & Education WG:**

The Training and Education WG was formally convened on Oct 3<sup>rd</sup> 2011. 5 volunteers have signed up to the working group. It is not necessary to have representatives from Dutch and UK groups because they already are co-chairs (Stephen Adams and Theo Verbeij). Stephen Adams volunteered to take the lead in ensuring the group activities start now.

The initial tasks for the working group were agreed by the Board in advance of the meeting and are documented here for reference:

- a) Collecting of existing training courses (Worldwide) for Patent Information

- of value to be trained for the Patent Information Examination/Certification
- to train skills required for Patent Information Specialist not tested in the Examination

**Deliverable:** Excel sheet with existing training courses (Frequency, Cost, Contents, etc.)

**Time line:** December 31st 2011

b) Preparing a curriculum for the Patent Information Examination/Certification

**Deliverable:** Document describing the required skills for a Patent Information Specialist

**Time line:** March 31st 2012

c) Proposals for tender and guiding the selection process for professional training institutes

**Deliverable:** Document describing the future responsibilities for the Working group regarding training activities

**Time line:** Depend on outcome b) and upcoming requests

Deadlines for deliverables were reviewed in this meeting to check that these are achievable. Stephen Adams pointed out that under point a) the remit has changed from Europe to Worldwide. It was agreed this is important because we are hearing more and more about India and other countries. However, Stephen requested that we limit information initially to European courses – if we did a good survey of courses of Europe, we should be able to find other similar courses elsewhere. Monika Hanelt commented that we could produce a survey of Europe which could then be passed to PIUG for them to provide additional information about courses in the US. It was agreed to limit scope of task a) to Europe and to see where we stand at Dec 31st.

Clarification about what is meant by a training course was requested by Guido Moradei. It was agreed that the current objective is to understand where the course providers are and what they are delivering. This could range from a high quality one day course from e.g. STN right through to a one semester course module.

The public availability of a curriculum for the exams was discussed. Views ranged from having a broad outline of what level of expertise is expected, to having a full curriculum available so that candidates have a detailed knowledge of what would need to be known to take the exam. Also, this would be useful for independent organizations who would be interested to have the curriculum laid out so they can develop commercial courses to deliver training to that curriculum. This will be discussed further with PDG and PIUG.

Bernd Wolter joined the meeting at 14:05.

c) **Short updates of activities** were provided by the member user groups:

CFIB – Annual meeting held at GSK in Belgium in June. Working groups were formed mostly in the area of tools, but the meeting attempted to cover too much content and the one day meeting was too short. An internal newsletter has been started and also a survey of members of career opportunities has been conducted. CFIB is currently working on a summary of findings to be published and plan to do a poster at next IPI-ConfEx. CFIB would like this to see this extended to other countries. The Training WG of CFIB has already done a draft of training courses in France which may be helpful for other groups as a model.

ACTION – French list to be distributed  
to other groups

PDG – Activities included reviewing the mock exams. Bernd Wolter reported back on this to the PDG Annual Members Conference.

BEPIUG – The group is still growing and recently held its 5th meeting. Meetings are held twice a year. There are currently 40 members comprised partly of in-house people from large companies and partly from research centres. BEPIUG would like to see more members from academia and will focus on building that membership. The board has now been established and the group operates in English. The group is using Wikimedia (same tool as PIUG) for communication between the board and membership and can recommend it.

AIDB – The group has 120 members still, but activities have been affected by the economic crisis resulting in closure of some information departments, so the group has lost some searchers. A couple of training opportunities have been organized, with Stephen Adams and with EPO. On Espacenet there are links to Italian citations and neither Italian PO nor EPO can answer about this. There is also text for claims, but this is not available on Espacenet or to commercial providers. The difficulty is that the Italian PO has only 6 directors, so they have too much to do. Planning has begun again for a 2 day conference with commercial providers giving workshops. Members from other groups are invited. It is a great effort to do this and difficult to see how this can be continued in the future. The event is currently free of charge, but could look for sponsors. Other activities include participation in mock exams, and a meeting organized to validate and share experience with other colleagues.

TSUG – Activities have included trying to change the name since the brief of the group is now much broader. A meeting is planned next month between TSUG and PATMG to explore possibilities for coming together. The group currently has 51 members and relies on volunteers to host meetings. A meeting is planned on issues about feeding back to vendors. TotalPatent and Stephen Adams will present.

WON – A meeting was held last week which attracted 80 attendees. Contributions are given from both members and vendors (informational presentation rather than commercial talks). Another installment of the WON/GO training course has just been given. A meeting was held in April also. Membership numbers remain stable.

6) Update on Certification of Patent Information Professionals

Bernd Wolter provided a summary of the mock examinations which took place during the first two weeks of October. The examination was taken by 58 candidates with two papers per candidate making a total of 116 papers in all.

In the days leading up to exam, some important lessons were learned: some typographical errors were discovered and corrected leading up to exam, but some typos were still spotted during the exam (some strange formulations language) which meant some candidates had to ask for clarification. Connection to the EPOQUE service was possible in the Swedish office, but not the German office. However, these candidates were examiners who were included in the mock exams for comparison. It was discovered that complex search queries cannot be loaded up to STN on the Web – one candidate formulated a strategy with one hundred lines, but that wouldn't run when loaded. Other anomalies included individual instances of candidates checking a bank account, an IKEA furniture account, and someone looking up information on Google. For a real exam, it will be important to restrict access; this might be done by having a “white list” of agreed sites. Monika Hanelt commented that for other exams, candidates are required to hand in the log-file and if there are blanks or disallowed sites, they are disqualified.

Due to the volume of marking and this being a volunteer effort, results are not expected until next year. Aalt van de Kuilen commented that we might expect that this is now too much for volunteers and that we need to discuss how to manage this going forwards. Discussion of plans to form an organization around the exam had been postponed until after the mock exams had taken place, so these will now need to start. There will also need to be a robust set of rules and regulations in place.

Bernd Wolter suggested that it would be nice to express a token of appreciation to the volunteers who traveled at their own cost in some cases staying overnight without asking for any reimbursement. In future, if there is enough interest, additional locations will be needed for exams. An exam in Italy would be desirable – the keyboards and software for Italian computers are different. CIBF are planning to check with EPO about providing facilities for an exam in Paris. Aalt van de Kuilen commented that this should be fine provided there is someone from the user group as moderator.

Ian Sinclair reminded the group about the importance of this milestone and offered congratulations on behalf of the group. Aalt van de Kuilen agreed about the importance of this milestone particularly with regard to the long history of taking the initiative to this point and thanked the WG for building the foundations to take this forwards from here.

7) A.O.B.

AIDB – There is an ongoing issue with request for information about searchers and providing recommendations. The current policy is not to give names, but only to report the request on the mailing list and invite members to contact the requester directly. But when, for example, WIPO ask for a good speaker or trainer to participate in their training programs, AIDB does not have a process to decide on a particular representative and provide a coordinated response to such a request. They will have to discuss this and come up with an ethical way to do this. CFIB has also this issue. It was agreed that this is an issue for which CEPIUG does not have a clear answer. We should consider this for discussion.

Aalt van de Kuilen thanked all for their presence and continuing commitment on behalf of the various national user groups to CEPIUG.

There being no further business to discuss, the meeting closed at 15:15