Education and Certification of Patent Information Professionals in Europe

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Agenda

• The work of the patent information professional
• The need for education/certification
• Historical initiatives
  – COPS/PDG/CEPIUG
• Current situation and next steps
The patent information professional’s role

“The task of the professional patent searcher is to understand the complex mix of science, law and information retrieval skills which enables the industrial user to make sense of the documents and to exploit their contents effectively”

Stephen Adams
Types of search

• Novelty/patentability
• Validity
• Infringement/Freedom to operate
• State-of-the-Art/Technical/Competitive landscape searching
Patent information professional requirements

• Knowledge of databases
• Knowledge of search systems
• Knowledge of technology
• Knowledge of patent law
• Interrogation, communication and presentation skills
• Tenacity, courage, patience
Historical initiatives

• PDG
  – Patent Documentation Group

• COPS(S)
  – Certification Of Patent Searchers
  – Committee Of Patent Search Standards

• AIDB
  – Working group on Certification, draft proposals June 2005

• CEPIUG

• PIUG
  – Certification Working Group (a team within the PIUG Education and Training Task Force)
Goals/Purposes of CEPIUG

• Share experiences
• Discuss topics relevant to all – exchange of opinions
• Promote and support set-up of new (national) user groups
• Promotion of Training activities
• Supporting Certification of the Profession
• NOT a pressure group!!
Two working groups:

- Training and education
  - Stimulate to set-up training all over Europe in order to prepare people for future certification

- Certification
  - Together with PDG and PIUG try to find ways to establish a Certification for Patent Information Specialists
Existing education/certification initiatives in Europe

• University information courses with IP information modules
  – City University London (Tamara Eisenschitz)
  – Loughborough University (Charles Oppenheim)

• GO Opleidigen
  – 5 modules
  – 18 days over 5 weeks

• CERTIDoc
  – The Certidoc consortium certifies a national certidoc organisation
  – The national certidoc organization certifies the national information professionals
  – National affiliates exist in Germany, France, Spain and Italy.
Current situation

“CERTIFICATION OF PATENT INFORMATION SPECIALISTS”
Joint CEPIUG-PDG proposal reviewed and commented by PIUG

– Definition of role
  • 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”
  • PIUG proposal to have formalised title with monitoring for misuse

– Grandfathering
  • Certification through exam only
  • Recognition of experience to be discussed separately
Current situation

– Admission requirements
  • Minimum BSc (or equivalent) plus 3 years experience or lower education level plus 10 years experience
  • May require specification by country
  • Entry could also be by assessment by an examination committee or do an admission test
  • PIUG proposal for tiered approach to accommodate differing needs
    – Tier 1 – Basic skills
    – Tier 2 – Full search and analysis skills
    – Tier 3 – As Tier 2 plus infringement searching skills
  • Subject to further discussion
Current situation

– Examination
  • To be conducted by independent body comprising practitioners in industry
  • To be fee-based
  • Two papers
    – Paper A – online search/practical test (technology specific versions)
    – Paper B – analysis test
  • PIUG proposal for Paper C testing infringement searching skills (specific technology-based) for proposed Tier 3 Certification
  • PIUG proposal to form a coalition of the currently existing and any future patent information user groups around the world to collectively act as the examining and certification issuing authority
Next steps

• Amendment of CEPIUG proposal following PIUG response
• Identify and agree international examination and certification issuing body
• Establish the title and definition of the profession that is associated to the certification/examination scheme
• Get support for examination from the profession
• Develop sample examination papers conduct mock exams
• Develop marking schemes
• Approval of sample examination by international examination body
• Consider whether certification need only be attained once during one's career or whether a continuing education scheme should be introduced
Thank you!

Q&A

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