

**RULES**  
**OF THE**  
**INTERNATIONAL STANDARDS BOARD**  
**FOR**  
**QUALIFIED PATENT INFORMATION**  
**PROFESSIONALS**



**Qualified Patent Information Professional**

**[www.qpip.org](http://www.qpip.org)**

## Table of Rules

RULE 1	TERM OF MEMBERS OF THE SUPERVISORY COUNCIL.....	3
RULE 2	PROFESSIONAL REPRESENTATIVES COLLEGIUM .....	3
RULE 3	COMMITTEES .....	4
3.1	General.....	4
3.2	Accreditation Committee .....	4
3.3	Examination Committee .....	5
3.4	Qualifications and Continued Professional Development Committee .....	5
3.5	Regulatory and Disciplinary Committee .....	5
RULE 4	ENROLMENT ELIGIBILITY FOR CERTIFICATION EXAMINATION.....	6
RULE 5	APPLICATION FOR ENROLMENT FOR CERTIFICATION EXAMINATION .....	10
RULE 6	EXAMINATION FEE.....	11
RULE 7	EXAMINATION SYLLABUS.....	11
RULE 8	CERTIFICATION EXAMINATION PAPERS.....	12
RULE 9	GENERAL INSTRUCTIONS FOR CANDIDATES ENROLLED TO SIT THE CERTIFICATION EXAMINATION.....	12
RULE 10	LANGUAGE OF CERTIFICATION EXAMINATION .....	13
RULE 11	DISABLED CANDIDATES.....	13
RULE 12	MONITORING FOR FRAUDULENT BEHAVIOUR.....	14
RULE 13	FRAUDULENT BEHAVIOUR.....	14
RULE 14	MARKING OF CERTIFICATION EXAMINATION PAPERS .....	15
RULE 15	PASSING THE CERTIFICATION EXAMINATION.....	15
RULE 16	APPEALS CONCERNING CERTIFICATION EXAMINATION GRADES .....	15
RULE 17	PRIOR EXPERIENCE RECOGNITION (PER) FOR EXPERIENCED PATENT INFORMATION PROFESSIONALS .....	16
RULE 18	APPLICATION FOR PRIOR EXPERIENCE RECOGNITION .....	19
RULE 19	PER APPLICATION FEE .....	21
RULE 20	APPEALS CONCERNING PER APPLICATION REJECTION.....	21
RULE 21	MAINTAINING QPIP REGISTRATION .....	22
RULE 22	CONTINUED PROFESSIONAL DEVELOPMENT (CPD) .....	23
RULE 23	APPEALS CONCERNING ANY DECISIONS NOT ELSEWHERE PROVIDED FOR.....	27
RULE 24	FINANCES AND EXPENDITURES .....	27
RULE 25	PAYMENT OF FEES .....	28
RULE 26	OFFICIAL LANGUAGE OF ISBQPIP .....	28
RULE 27	ENTRY INTO FORCE .....	28

## **Rules of the International Standards Board for Qualified Patent Information Professionals (ISBQPIP)**

These Rules of the International Standards Board for Qualified Patent Information Professionals (ISBQPIP), hereinafter the Rules, commencing on **31 August 2018** serve to implement the Articles of the International Standards Board for Qualified Patent Information Professionals (ISBQPIP) which came into effect on **31 August 2018**. The Articles are hereby incorporated by reference.

[↑ Table of Rules](#)

### **RULE 1                    TERM OF MEMBERS OF THE SUPERVISORY COUNCIL**

Pursuant to ARTICLE 4.2 and 14.1(2), a minimum of five (5) members but no more than nine (9) members shall be appointed by election by the Professional Representatives Collegium to form the Supervisory Council.

- 1.1** The term of office shall be fixed at three (3) years pursuant to ARTICLE 4.5.
- 1.2** Upon expiry of the term specified in RULE **Error! Reference source not found.**, the member may be re-appointed in accordance with ARTICLE 4.2, 4.5 and 14.1(2) for the same position or another vacant position for a second term, which will be of three (3) years.
- 1.3** A Supervisory Council member who has served for two consecutive terms may only be reappointed after an interval of one (1) year.
- 1.4** The Supervisory Council members may delegate any of their powers or functions to a committee or other delegate, provided the terms and conditions on which the delegation is made are unanimously approved by the Supervisory Council.

[↑ Table of Rules](#)

### **RULE 2                    PROFESSIONAL REPRESENTATIVES COLLEGIUM**

- 2.1** The Professional Representatives Collegium will be responsible for the collection of nominations from which the members of the Supervisory Council will be elected.
- 2.2** The Professional Representatives Collegium shall preferably consist of one member per represented organisation which may include patent authorities such as WIPO, national and regional patent offices, and organisations such as patent information user groups and patent attorney associations.
- 2.3** The Professional Representatives Collegium decides on the composition of the collegium and how to conduct the collegium's work in accordance with ARTICLE 14.

**RULE 3**                      **COMMITTEES****3.1 General**

- 3.1a** Each member of each committee shall be appointed by the Supervisory Council.
- 3.1b** Each meeting of a committee shall be convened by its committee chair with the frequency that is required to accomplish the committee's tasks, or as required by the Supervisory Council.
- 3.1c** Each committee shall take decisions by a simple majority.
- 3.1d** All committees should take their decisions using the Rules and Articles as a guidance.
- 3.1e** The Supervisory Council may by simple majority remove any member of a committee.

**3.2 Accreditation Committee**

- 3.2a** The Accreditation Committee shall consist of at least three (3) members appointed by the Supervisory Council.
- 3.2b** In accordance with ARTICLE 10.3, the Accreditation Committee shall review applications for accreditation of training or courses and recommend to the Supervisory Council accreditation of the proposed training or courses if the training or courses provide suitable content of sufficient level to prepare candidates for the certification examination;
  - (1) Suitable content includes but is not limited to lectures, case studies, practical workshops conducted in person or by distance correspondence;
  - (2) Sufficient level shall be met if the learning outcomes of the training or course would, in the opinion of the majority of the committee, enable a candidate to acquire some or all of the knowledge necessary to pass the certification examination and to practise as a QPIP.
- 3.2c** In deciding whether or not to recommend accreditation, the committee must consider whether the learning outcomes of the proposed training or course addresses some or all of the aspects of study referred to in Schedules 1 or 2 by taking into consideration any information provided in support of the accreditation application.
- 3.2d** An application for accreditation must be in accordance with the procedure provided at [www.qpip.org](http://www.qpip.org) and the following requirements:
  - (1) The applicant must submit a detailed summary of the course content including any prerequisites required to undertake the course of study.
  - (2) The applicant must provide free course or training registration for one (1) committee member or a delegate thereof to evaluate the proposed course of study for accreditation.
- 3.2e** An application form and supporting documentation for accreditation can be submitted at any time.
- 3.2f** The application form and supporting documentation must be accompanied by the payment of an administrative fee as stated at [www.qpip.org](http://www.qpip.org)
- 3.2g** Subject to RULE 3.2i, if the Supervisory Council, on the recommendation of the Accreditation Committee, accredits the proposed training or course,

accreditation shall be for a period of three (3) years from the date the accreditation application is approved by the Supervisory Council.

**3.2h** If the content of the accredited training or course as far as relevant to a QPIP according to the Syllabus is significantly changed, i.e. parts removed or added, for any reason during the period of accreditation as indicated in RULE 3.2g, the Accreditation Committee must be informed in writing three (3) months before the change is made

(1) If the Accreditation Committee is not informed in accordance with Rule 3.2h, the accreditation shall be terminated by the Supervisory Council for the remainder of the accreditation period.

**3.2i** The Supervisory Council may on the recommendation of the Accreditation Committee terminate accreditation if the Supervisory Council decides that the accredited training or course no longer achieves the learning outcomes that supported the accreditation.

### **3.3 Examination Committee**

**3.3a** The Examination Committee shall consist of at least five (5) members appointed by the Supervisory Council.

### **3.4 Qualifications and Continued Professional Development Committee**

**3.4a** The Qualifications and Continued Professional Development Committee shall consist of at least three (3) members appointed by the Supervisory Council.

**3.4b** The committee shall actively monitor developments in the patent information industry to determine if the eligibility requirements for enrolment in the certification examination as specified in RULE 4 need to be revised.

### **3.5 Regulatory and Disciplinary Committee**

**3.5a** The Regulatory and Disciplinary Committee shall consist of at least three (3) members appointed by the Supervisory Council.

**3.5b** In accordance with ARTICLE 10.6a(1), the punishment, unless specified elsewhere in the Rules, that may be imposed by the Regulatory and Disciplinary Committee for the interfering or damaging act or omission shall be determined by the committee on a case-by-case basis and may include but are not limited to:

- (1) A ban from applying to or receiving from the ISBQPIP any benefit as provided by the Articles or Rules for a period of time as determined by the committee;
- (2) Suspension or denial of registration as a QPIP for a period of time as determined by the committee; or
- (3) Termination or denial of registration as a QPIP indefinitely

**3.5c** The ISBQPIP may make publicly available the committee's decision to impose any one of the punishments specified in RULE 3.5b or specified elsewhere in the Rules by publishing the decision at [www.qpip.org](http://www.qpip.org)

**3.5d** An annual random audit of CPD shall be conducted in accordance with RULE 23.5 and the following requirements:

- (1) The audited QPIP shall be contacted by the committee or a delegate thereof and notified in writing that the QPIP's Continued Professional

Development (CPD) activity during the previous calendar year is being audited and that written evidence of CPD activity will be requested in sufficient detail as specified in RULE 23.5c, together with any other information as requested by the committee or required in accordance with the procedure provided at [www.qpip.org](http://www.qpip.org).

- (2) In the event the audited QPIP is unable or refuses, without reasonable excuse, to provide the committee with the requested written evidence of CPD activity within the time limit specified by the committee, the committee may impose a penalty as specified in RULE 3.5b;
  - (i) Unless a reasonable excuse not to comply with the committee's request has arisen because of an event beyond the control of the QPIP such as but not limited to illness that occurred within the previous thirty (30) calendar days of the date on which the audit notification is sent by the committee;
  - (ii) Notwithstanding RULE 3.5d(2)(i), it remains at all times the QPIP's responsibility to notify the committee if an exemption from CPD applies in accordance with RULE 23.6;
  - (iii) If an exemption applies but has not yet been requested in accordance with RULE 23.6, RULE 3.5d(2)(i) cannot be invoked.

**3.5e** In accordance with ARTICLE 10.6a(3), the committee shall receive and assess any requests from a QPIP for an exemption as specified in RULE 23.6.

**3.5f** In accordance with ARTICLE 10.6a(4) and ARTICLE 11, the complaint made against a QPIP about the person's professional conduct must be provided in writing to the committee in a manner as follows:

- (1) The complainant must be a natural person irrespective of whether the person is serving for the purposes of the complaint as a representative of a legal entity or not;
- (2) The identity including the full name, address and current contact information of the complainant must be provided;
- (3) Detailed information including the substance of the allegation against the QPIP including a historical account that supports the allegation including dates, transactional or financial information and any other information pertinent to the complaint.

**3.5g** In accordance with ARTICLE 10.6a(4), the committee shall provide to the Supervisory Council a reasoned statement in writing for its recommended course of action that:

- (1) Sets out the reasons for its recommendation;
- (2) Sets out the findings on any material questions of fact; and
- (3) Refers to evidence or other material on which the findings of fact are based.

**3.5h** A member of the Regulatory and Disciplinary committee or the Supervisory Council shall not take part in the handling of a complaint against a decision in which they themselves have been involved

- (1)

[↑ Table of Rules](#)

**RULE 4**                      **ENROLMENT ELIGIBILITY FOR CERTIFICATION EXAMINATION**

**4.1** A candidate wishing to enrol for the Certification Examination must meet the requirements set out in RULE 4.2 to RULE 4.5 at the time of application for enrolment as specified in RULE 5.1 and pay the enrolment fee.

**4.2 Minimum work experience requirements:** At the date of the certification examination, the candidate must have at least three (3) years of work experience with at least 60% of that time spent on searching patent information or a combination of searching and mentoring or a combination of searching and outsourcing or a combination of searching and overseeing search work of others according to the following definitions in each and every year of the 3 year period preceding the date of application. If in the 3 year period preceding the date of application, there is one or more gaps in the 3 year period, the applicant must explain the reason(s) for the gap(s)<sup>1</sup>, provide supporting evidence and provide details about additional work experience in searching patent information that occurred beyond the preceding 3 year period from the date of application in order to establish that the applicant has a total of 3 non-consecutive years of work experience.

“Searching” includes: understanding the search request, discussions with the person requesting the search, devising a search strategy, searching, evaluating search results, report writing/presenting results and post search discussion.

“Outsourcing” is defined as preparing search requests and instructions for the search service provider who will conduct the search and evaluating results from the outsourcing search service provider.

“Mentoring” is defined as providing training, coaching and/or support in patent searching, wherein the training may focus on a specific patent information database or tool, but the training cannot be conducted by vendor representatives. Mentoring also does not include managing patent searchers.

“Overseeing search work of others” is defined as directly supervising and directing the work of others within the same organisation who in the past three years have each completed at least 45 search projects selected from the list of searches provided in Rule 4.3.

**4.3 Search projects<sup>2</sup> to be completed:** At the time of applying for enrolment for the certification examination as indicated in RULE 5.1, the candidate must have

---

<sup>1</sup> Possible reasons for gaps may include but are not limited to voluntary or involuntary termination of employment of the examination applicant, temporary assignments, temporary role changes, maternity leave, paternity leave, adoption, carer’s leave, sabbatical, secondment or illness.

<sup>2</sup> A single search project can include several individual searches that all aim to answer the question(s) posed by that search project.

completed at least forty-five (45)<sup>3</sup> search projects selected from the list below within the three (3) years preceding the application, the search projects being conducted in the course of business (not for personal interest). If in the 3 year period preceding the date of application, there is one or more gaps in the 3 year period, the applicant must explain the reason(s) for the gap(s)<sup>4</sup>, provide supporting evidence and provide details about additional work experience in searching patent information that occurred beyond the preceding 3 year period from the date of application in order to establish that the applicant has a total of at least forty-five (45) search projects have been completed in 3 non-consecutive years of work experience. The types of searches suitable for the purpose of the minimum work experience requirement are defined as follows:

A "freedom-to-operate search" is searching for and evaluating any intellectual property rights including but not limited to patents, trade marks, and design registrations, as well as any regulatory standards or industry standards or domestic law that would prevent the sale, manufacture or use of a product, process or system in a particular jurisdiction;

A "novelty search" is searching for and evaluating any prior art that includes prior use or any printed or electronic media describing all of the features of the claimed or proposed invention;

An "opposition search" is searching for and evaluating any prior art that includes prior use or any printed or electronic media describing some or all of features of the claimed invention, and which was made publicly available before the filing date or priority date of the patent of concern (in the case of post-grant opposition) or the filing date or priority date of the accepted patent application of concern (in the case of pre-grant opposition);

A "patentability search" is searching for and evaluating any prior art that includes prior use or any printed or electronic media describing somewhere in the document some or all of features of the claimed or proposed invention such that a novelty or inventive step/obviousness issue arises;

A "patent infringement risk search" is searching for and evaluating granted patents that are still in force, 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;

---

<sup>3</sup> It is believed that 45 searches over 3 years are feasible for those who also do other type of (search) work not listed in the definitions. A single search project can include several individual searches that all aim to answer the question(s) posed by that search project.

<sup>4</sup> Possible reasons for gaps may include but are not limited to voluntary or involuntary termination of employment of the examination applicant, temporary assignments, temporary role changes, maternity leave, paternity leave, adoption, carer's leave, sabbatical, secondment or illness.



A “patent landscape search” is searching for, evaluating and analyzing 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.

A “validity search” is searching for and evaluating any prior art that includes prior use or any printed or electronic media describing somewhere in the document some or all of features of the claimed invention, wherein the document was made publicly available before the filing date of the patent or a date from which priority is claimed.

**4.4 Minimum technical qualification requirement:** At the time of applying for enrolment for the certification examination as indicated in RULE 5.1, the candidate must have:

- 4.4a** At least a scientific, engineering or technical Bachelor Degree of three (3) year or four (4) year program duration in a technical field e.g. as included in any publicly available edition of the patent classification system that is administered by the World Intellectual Property Office, the European Patent Office, the United States Patent and Trademark Office, the Japan Patent Office or any other national patent office; **or**
- 4.4b** At least a technical qualification in a technical field e.g. as included in any edition of any patent classification system as defined in RULE 4.4a wherein the technical qualification was conferred by a university, technical university, technical high school, vocational college, higher technical college or institute, school of engineering, or any similar establishment and the qualification is deemed equivalent to a Bachelor Degree by the Netherlands Organisation for International Cooperation in Higher Education; **or**
- 4.4c** At least ten (10) years of experience working in a technical field as included in any edition of any patent classification system as defined in RULE 4.4a.

**4.5 Required evidence in support of application for enrolment for the certification examination**

- 4.5a** The candidate must provide at the time indicated in RULE 5.1a the documentation and evidence as specified in RULES 4.5b, 4.5c, and 4.5d, as applicable, in support of their application for enrolment in the certification examination.
- 4.5b** All candidates must provide a signed letter from their current and/or past employer(s) on company letterhead, subject to RULES 4.5b (1)-(3), stating the number of years of employment, the percentage of time spent on the activities specified in RULE 4.2 over the course of the required three (3) years of work experience and the number of search projects as specified in RULE 4.3. If the company letter is in a language other than English, the candidates must also provide screenshots of a machine translation of the body of the letter.
  - (1) If a candidate has had more than one employer over the course of the required three (3) years of work experience, the candidate must obtain letters from each employer in order to substantiate the claimed work experience.

- (2) If a candidate was self-employed over the course of the required three (3) years of work experience, evidence of business registration as a search firm or patent information search consultant must be provided to substantiate the claimed work experience.
  - (3) If a candidate's work experience includes both employment and self-employment, then a letter from the employer(s) as well as evidence of business registration as a search firm or patent information search consultant must be provided to substantiate the claimed work experience over the course of the required three (3) years of work experience.
- 4.5c** All candidates must provide a full *curriculum vitae* in English that includes at least a record of technical qualifications in accordance with RULE 4.4, all relevant employment positions held, any publications or conference presentations authored or co-authored, any current memberships of professional user groups, societies or other related organisations and any positions held within those professional user groups, societies or other related organisations.
- 4.5d** The candidate must provide any additional documentation requested by the Secretariat or a delegate thereof.

[↑ Table of Rules](#)

## RULE 5

### APPLICATION FOR ENROLMENT FOR CERTIFICATION EXAMINATION

- 5.1** To be considered for enrolment for the certification examination, candidates shall complete the enrolment application form available at [www.qpip.org](http://www.qpip.org) and the supporting documentation as set out in RULE 4.5. By completing and submitting the enrolment application form, the candidate shall automatically become an associate according to ARTICLE 5.2.
- 5.1a** The completed form and all of the supporting documentation must be submitted electronically in legible PDF format by uploading the documents in the examination registration form provided at [www.qpip.org](http://www.qpip.org)
  - 5.1b** The electronic transmission of the completed form and all of the supporting documentation must be date stamped no later than 11:59 pm (Central European (Summer) time) on the last day as referred to in the public announcements of the application window for the examinations.
  - 5.1c** Subject to RULE 6.5, the ISBQPIP shall provide to the candidate an electronic confirmation of receipt of the application and supporting document after the registration form has been submitted.
  - 5.1d** Subsequent to receiving the electronic confirmation of receipt, the candidate may be asked by the Secretariat or delegate thereof to provide further documentation in accordance with RULE 4.5d.
  - 5.1e** A candidate will only be excused from meeting the requirement of RULE 5.1b, in the event of a computer failure or electronic transmission failure caused by the ISBQPIP's electronic infrastructure, a natural disaster, war, government regulation, nuclear disaster, fire, labour disputes, civil disorder within a 50 kilometre radius of the candidate's residence or place of business, or any other cause beyond the control of the candidate that would make it illegal or impossible to comply with the time requirement of RULE 5.1b. In all other circumstances, the candidate's late application will be disregarded and the

candidate will not be eligible to sit for the next scheduled certification examination.

- 5.1f** In the event, a candidate's application is disregarded in accordance with RULE 5.1e, the candidate must submit a new enrolment form and supporting documentation as required by RULE 4.5, in order to be considered for enrolment for a future certification examination.
  - 5.1g** All applications for enrolment in the certification examination shall be reviewed by the Qualifications and Continued Professional Development Committee to determine if the candidate is eligible to sit the certification examination.
  - 5.1h** The candidate will be informed in writing of the outcome of the review of the enrolment application.
  - 5.1i** The notification provided to the candidate in accordance with RULE 5.1h shall include a statement as to whether the eligibility requirements have been met.
- 5.2** After acceptance of the application for enrolment for the certification examination as indicated in RULE 5.1, the candidate shall pay the examination fee specified in RULE 6.

[↑ Table of Rules](#)

## **RULE 6**                      **EXAMINATION FEE**

- 6.1** The non-refundable fee for sitting the certification examination shall be decided each year by the Supervisory Council and shall be published at [www.qpip.org](http://www.qpip.org) with effect from 1 January until 31 December each year.
- 6.2** The fee for sitting any one part of the certification examination for the candidate's first time shall be published at [www.qpip.org](http://www.qpip.org) with effect from 1 January until 31 December each year.
- 6.3** In the event the candidate needs to re-sit the certification examination in full or in part, the corresponding fee for resitting the exam in full or in part shall be published at [www.qpip.org](http://www.qpip.org) with effect from 1 January until 31 December each year.
- 6.4** A candidate may re-sit the certification examination until all requirements are met to be registered as a Qualified Patent Information Professional (QPIP), including payment of the examination fee for each re-sit.
- 6.5** An application for enrolment for the certification examination shall only be deemed to have been received once the fees indicated in RULE 6.1, 6.2 or 6.3 have been paid.
- 6.6** The Secretariat or a delegate thereof may request additional information in regard to payment of the fees indicated in RULE 6.1, 6.2 or 6.3.
- 6.7** In the event that a candidate fails to meet the eligibility criteria in accordance with RULE 4, the enrolment fee paid by the candidate is non-refundable and non-transferrable. The examination fee paid will either be forfeited or the individual may

use the paid amount towards paying the QPIP certification exams the first time they meet the eligibility criteria.

[↑Table of Rules](#)

## **RULE 7**                      **EXAMINATION SYLLABUS**

- 7.1** A syllabus to assist a candidate's preparation for the certification examination is provided in Schedule 1 regarding the expected searching knowledge and skills a candidate should possess before sitting for the certification examination.
- 7.2** A syllabus to assist a candidate's preparation for the certification examination is provided in Schedule 2 regarding the expected patent law and analysis knowledge and skills a candidate should possess before sitting for the certification examination.

[↑Table of Rules](#)

## **RULE 8**                      **CERTIFICATION EXAMINATION PAPERS**

- 8.1** The examination shall consist of six parts subject to RULE 8.2:
- (1) A part pertaining to devising and conducting a novelty, validity or opposition search as defined in RULE 4.3, where the candidate shall select from the different technical scenarios; and
  - (2) A part pertaining to devising and conducting a patent infringement risk search as defined in RULE 4.3, where the candidate shall select from the different technical scenarios; and
  - (3) General theory questions to test the candidate's knowledge on patent law of major patenting jurisdictions including but not limited to Europe, the United States, China, Japan and Korea and patent searching that is relevant to either searching or reviewing and categorising patent and non-patent publications; and
  - (4) A technology-neutral fact scenario in which the enrolled candidate shall review and categorise the patent and non-patent publications provided with the examination paper in order to provide one novelty, validity or opposition search report or one patent infringement risk search report; and
  - (5) Patent landscaping related theory questions; and
  - (6) A technology-neutral fact scenario in which the enrolled candidate shall evaluate, clean up and analyse a large set of patent data and produce charts that provide insights on the general direction in which patent metrics are developing or changing.
- 8.2** Examination papers in addition to or instead of those indicated in RULE 8.1 may be introduced in the future to assess whether a candidate's competence meets the requirements concerning the aspects for which the introduced examination papers are designed to test.
- 8.3** The examination specified in RULE 8.1 shall be held at least once every two (2) years in accordance with ARTICLE 6.2 in the first quarter of a calendar year.

[↑Table of Rules](#)**RULE 9**                    **GENERAL INSTRUCTIONS FOR CANDIDATES ENROLLED TO SIT THE CERTIFICATION EXAMINATION**

- 9.1** Candidates are expected to be familiar with the Articles and Rules in force.
- 9.2** Candidates shall accept the facts given in the examination paper and limit themselves to those facts. Whether and to what extent those facts are used shall be the responsibility of each candidate.
- 9.3** At the start of each part of the examination, the candidate shall present identification such as an unexpired passport, unexpired driver's licence or unexpired identification card that includes a photograph of the candidate's face and that bears the handwritten signature of the candidate, while a photo is taken via the candidate's webcam of the candidate's face and the candidate's identification.

[↑Table of Rules](#)**RULE 10**                    **LANGUAGE OF CERTIFICATION EXAMINATION**

- 10.1** All examination questions shall be in English.
- 10.2** Candidates shall submit their answers to all examination papers in English.
- 10.3** For the case studies of the search paper and the patent landscaping case study of the analysis search paper, the candidates should use their own database(s) and tools, with the restriction that the working language of the database(s) must be English as all answers including any search histories and search results must be in English. If candidates don't have access to an (English interface) database, they should contact the ISBQPIP ([secretariat@qip.org](mailto:secretariat@qip.org)) at least two weeks before the exam in order for the ISBQPIP to be able to arrange any alternatives.

[↑Table of Rules](#)**RULE 11**                    **DISABLED CANDIDATES**

- 11.1** Disabled candidates are those who can prove that they suffer from a disability severely affecting their capacity to participate in the examination as set up for all other candidates.
- 11.1a** Any such candidate shall provide to the Secretariat evidence issued in English by the competent authority to attest to the extent of their disability.
- 11.1b** The evidence specified in RULE 11.1a shall accompany the application for enrolment for the certification examination as defined in RULE 5.
- 11.1c** Depending on the severity and degree of the disability, the Secretariat or delegate thereof may allow the candidate to participate in the examination under conditions which compensate as far as possible for the consequences of the candidate's disability in respect of the examination.

- 11.2** Additional time for writing the examination papers, personal assistance or other logistical or technical support may be accorded as appropriate depending on the circumstances of a particular case.

[↑Table of Rules](#)

**RULE 12**                    **MONITORING FOR FRAUDULENT BEHAVIOUR**

- 12.1** Invigilation during the examination is performed by automatically taking photos from the candidate at random intervals.
- 12.2** The photos taken during an examination part shall be reviewed by the persons marking that part of the examination and shall be removed from any of the ISBQPIP's storage systems as soon as the marking of the candidate's exam part is finalized.
- 12.3** Detection methods to identify indications of fraudulent behaviour will be applied to the results provided by the candidate.
- 12.4** Any indications of fraudulent behaviour will be reported to the Regulatory and Disciplinary Committee for a decision according to **Error! Reference source not found.**

[↑Table of Rules](#)

**RULE 13**                    **FRAUDULENT BEHAVIOUR RELATING TO EXAMINATION**

- 13.1** Fraudulent behaviour is any behaviour by a candidate with the aim of obtaining an undue advantage in applying for enrolment as a candidate to sit the certification examination, during the examination or after the examination including at the time of registration as a QPIP or at the time of renewing QPIP registration. Such behaviour may consist, inter alia, of presenting false documents, making false or incomplete statements and/or communicating regarding the content of the examination with other persons during the examination.
- 13.2** The following measures may be taken by the ISBQPIP if fraudulent behaviour has been detected in applying for enrolment as a candidate to sit the certification examination or during the examination:
- 13.2a** Refusal of enrolment for the forthcoming and subsequent examinations;
  - 13.2b** Deduction of marks regarding the candidate's examination answer papers;
  - 13.2c** Disqualification from sitting the examination for one or more years.
- 13.3** A decision concerning the options in RULE 13.2 will be made by the Regulatory and Disciplinary Committee as soon as possible after the fraudulent behaviour has been detected.
- 13.4** The following measures may be taken by the ISBQPIP if fraudulent behaviour is detected after the examination including at the time of registration as a QPIP or at the time of renewing QPIP registration:

- 13.4a** Refusal to register the candidate as a QPIP for a period of time as determined by the Regulatory and Disciplinary Committee; or
  - 13.4b** Suspension of registration as a QPIP for a period of time as determined by the Regulatory and Disciplinary Committee; or
  - 13.4c** Revocation of registration as a QPIP indefinitely.
- 13.5** A decision concerning the options in RULE 13.4 will be made by the Regulatory and Disciplinary Committee as soon as possible after the fraudulent behaviour has been detected.
- 13.6** Any decision taken by the ISBQPIP pursuant to RULE 13 shall be based upon all the available evidence, reasoned and issued in English in writing.

[↑Table of Rules](#)

## **RULE 14**                    **MARKING OF CERTIFICATION EXAMINATION PAPERS**

- 14.1** When marking answer papers, the members of the Examination Committee shall bear in mind that candidates may have written their answers in a language other than their mother tongue. Errors of grammar or style shall therefore not be penalised.
- 14.2 Marking sheets**
- 14.2a** Details of the marking shall be entered on marking sheets.
  - 14.2b** The Secretariat shall make available to the enrolled candidates example marking sheets at the time of releasing the grades as specified in RULE 15.3.
- 14.3** Two separate members of the examination committee will mark each examination part and agree upon a mark.

[↑Table of Rules](#)

## **RULE 15**                    **PASSING THE CERTIFICATION EXAMINATION**

- 15.1** A candidate shall be declared to have passed the examination if the candidate has been awarded a PASS grade for all of the examination parts.
- 15.2** In the event the candidate fails to obtain a PASS grade for one or more exam parts, they may re-sit those examination part(s) for which a PASS grade was not awarded a maximum of twice at the next three (3) opportunities, after which the candidate would have to re-sit all parts to qualify as a QPIP.
- 15.3** Grades for the examination papers shall be released to each enrolled candidate no later than 1 August in the year the exam was held.
- 15.4** If a candidate does not pass all the parts, then they will not be eligible to be registered as a QPIP but the ISBQPIP will keep a record of each part for which a PASS

grade was awarded until two further examination opportunities were offered and for a maximum period of five (5) years.

[↑Table of Rules](#)

## **RULE 16**                    **APPEALS CONCERNING CERTIFICATION EXAMINATION GRADES**

- 16.1** Any candidate may submit an appeal to request review of the marks awarded for one or more of the candidate's examination parts.
- 16.2** An appeal must be submitted in English to the Secretariat within two (2) weeks after the candidate has been informed of the grades and the appeal must be accompanied by:
- (1) the appeal fee as specified in RULE 16.3; and
  - (2) supporting documentation as specified in RULE 16.5.
- 16.3** The appeal fee shall be three (3) times the examination fee specified in RULE 6 and the appeal fee shall only be refunded if the appeal is successful.
- 16.4** The appeal will not be deemed submitted by the Secretariat until the appeal fee has been paid.
- 16.5** Supporting documentation may include rebuttal based on the sample marking sheet provided to the candidate.
- 16.6** The appeal shall only be considered in English by the Supervisory Council and one (1) member of the Examination Committee.
- 16.7** A written appeal decision in English shall be rendered by the Supervisory Council within twelve (12) months from the date the appeal is deemed by the Secretariat to have been submitted.
- 16.8** The decision of the Supervisory Council in accordance with RULE 16.7 is final and is not subject to further appeal.

[↑Table of Rules](#)

## **RULE 17**                    **PRIOR EXPERIENCE RECOGNITION (PER) FOR EXPERIENCED PATENT INFORMATION PROFESSIONALS**

- 17.1** A person may apply for Prior Experience Recognition (PER) status instead of enrolling for the certification examination referred to in RULE 8 if the person meets the eligibility criteria for PER set out in RULE 17.3, and only when the opportunity to apply for PER is offered in the country of residence of that person. By applying for PER status, the candidate shall automatically become an associate according to ARTICLE 5.2.

### **17.2 Invitation for submission of PER applications**



Because the ISBQPIP does not have the capacity to receive and assess applications from all over the world, initially only residents of the United States of America or Europe were invited to apply for PER. Residents of other countries will be invited in the course of time, depending on the available capacity. The public invitation will provide details of the application process and the required documentation to support an individual's PER application.

### **17.3 PER Eligibility Requirements<sup>5</sup>**

#### **17.3a Willingness to contribute.<sup>6</sup>**

- (1) All applicants registered as QPIP via PER shall serve at the request of the ISBQPIP on a committee of the ISBQPIP for a period of time in accordance with ARTICLE 10, or shall be required to participate in developing accredited training or courses related to the core competencies of the certification examination as defined in RULE 17.3b, or in attending and evaluating public training courses.
- (2) A roster that includes the names of all those who have obtained PER status shall be used by the ISBQPIP to randomly select individuals to participate as needed.
- (3) If an individual registered as QPIP via PER is selected to participate in accordance with RULE 17.3a, but is unable to do so for whatever reason, the individual will be excused from participating for a maximum of two (2) times without losing their QPIP registration. If they refuse a third consecutive time their QPIP registration will be revoked, any registration renewal fee that has been paid will be forfeited and they will no longer be registered as a QPIP.

#### **17.3b Professional commitment to certification standard<sup>7</sup>**

- (1) All applicants granted PER status must ensure they teach or otherwise exchange knowledge by teaching or developing a course or attending one or more courses directed to each of the three core competencies of the certification examination at some point during the three years from the date the PER applicant is registered as a QPIP. The three core competencies of the QPIP certification examination in accordance with RULE 8 are:
  - (i) Knowledge of patent law and patent systems;
  - (ii) Searching – approaches for devising and conducting a novelty, validity or opposition search and approaches for devising and conducting a patent infringement risk search as defined in RULE 4.3; and

---

<sup>5</sup> Anybody who is convinced that (s)he should be recognised as PER but does not meet all requirements listed in the Rules, should request a review of experiences and competencies providing sufficient evidence. (see Hardship/Force Majeure clause Article 19)

<sup>6</sup> This requirement is necessary to establish a pool of sufficiently experienced individuals to draw upon to train others, develop and mark exams or otherwise participate in the ISBQPIP.

<sup>7</sup> This requirement is necessary to establish a supply and demand for courses to be developed, presented and attended by a pool of sufficiently experienced individuals to allow a broad education for the future QPIP's.

(iii) Analysis - approaches for reviewing and categorising patent publications identified by a patent infringement risk search and approaches for reviewing patent and non-patent publications identified by a novelty, validity or opposition search as defined in RULE 4.3.

(2) Any activity conducted in accordance with RULE 17.3a(1) can be counted towards the minimum Continued Profession Development Points (CDP) as required in RULE 23.1.

**17.3c Minimum work experience requirements:** At the time of applying for PER status, the applicant must have at least ten (10) years of work experience with at least 60% of that time spent on searching patent information or a combination of searching and mentoring or a combination of searching and outsourcing or a combination of searching and overseeing search work of others according to the definitions in RULE 4.2 in each and every year of the 10 year period preceding the date of application. If in the 10 year period preceding the date of application, there is one or more gaps in the 10 year period, the applicant must explain the reason(s)<sup>8</sup>, provide supporting evidence and provide details about additional work experience in searching patent information that occurred beyond the preceding 10 year period from the date of application in order to establish that the applicant has a total of 10 non-consecutive years of work experience.

**17.3d Search projects<sup>9</sup> to be completed:** The applicant must indicate in the application for PER status which types of search projects according to the definitions in RULE 4.3 (s)he has been performing, outsourcing or overseeing in the ten (10) years preceding the date of application, and give an indication of amounts and time spent. This information will be used to assess the breadth and depth of the applicant's experience. The search projects specified need not be conducted on behalf of any particular entity, but the search projects must be conducted in the course of business (not for personal interest).

**17.3e Minimum technical qualification requirement:** At the time of applying for PER status, the candidate must have:

- (1) At least a scientific, engineering or technical Bachelor Degree of three (3) year or four (4) year program duration in a technical field as defined in any publicly available edition of the patent classification system that is administered by the World Intellectual Property Office, the European Patent Office, the DPMA (German Patent and Trade Mark Office), the United States Patent and Trademark Office, the Japan Patent Office or any other national patent office; or
- (2) At least a technical qualification in a technical field as defined by any edition of any patent classification system as defined in RULE 17.3e (1) wherein the technical qualification was conferred by a university, technical university, technical high school, vocational college, higher technical

---

<sup>8</sup> Possible reasons for gaps may include but are not limited to voluntary or involuntary termination of employment of the PER applicant, temporary assignments, temporary role changes, maternity leave, paternity leave, adoption, carer's leave, sabbatical, secondment or illness.

<sup>9</sup> A single search project can include several individual searches that all aim to answer the question(s) posed by that search project.

college or institute, school of engineering, or any similar establishment and the qualification is deemed equivalent to a Bachelor Degree by the Netherlands Organisation for International Cooperation in Higher Education; or

- (3) At least ten (10) years of experience working in a technical field as defined by any edition of any patent classification system as defined in RULE (1).

**17.3f Continued Professional Development Activity Prior to PER Application<sup>10</sup>**

At the time of applying for PER status, the candidate must have completed a minimum of five (5) Continued Professional Development (CPD) points as defined in RULE 23.7 which must be accumulated in the twelve (12) months prior to applying for PER status.

**17.4 Required Evidence in support of Application for PER Status**

At the time of applying for PER status, the applicant must provide the documentation as specified in this Rule, as applicable, in support of their application for PER. Evidence must be provided when requested.<sup>11</sup>

**17.4a** All candidates must provide a signed letter from their current and/or past employer(s) on company letterhead, stating the number of years of employment, the percentage of time spent during those years of employment on the activities specified in RULE 17.3c over the course of the required ten (10) years of work experience, and the number of search projects as specified in RULE 4.3. If the company letter is in a language other than English, the candidates must also provide screenshots of a machine translation of the body of the letter.

- (1) If an applicant has had more than one employer over the course of the required ten (10) years of work experience, the applicant must obtain letters from each employer in order to substantiate the claimed work experience.
- (2) If an applicant was self-employed over the entire course of the required ten (10) years of work experience, evidence of business registration as a search firm or patent information search consultant must be provided to substantiate the claimed work experience.
- (3) If an applicant's work experience includes both employment and self-employment, then a letter from the employer(s) as well as evidence of business registration as a search firm or patent information search consultant must be provided to substantiate the claimed work experience for the course of the required ten (10) years of work experience.

**17.4b** All PER applicants must provide a full curriculum vitae in English that includes at least a record of technical qualifications in accordance with RULE 17.3e, all employment positions held, any publications or conference presentations authored or co-authored, any current or previous memberships of professional user groups, societies or other related organisations and any positions held within those professional user groups, societies or other related organisations.

---

<sup>10</sup> This requirement is to have people who are actively maintaining their knowledge. In the PER application form they should specify what they have done regarding CPD.

<sup>11</sup> Evidence may include: copies of educational certificates, diplomas, etc.; evidence of conference presentations/publications and/or evidence of payment of patent information related membership fees.

**RULE 18                      APPLICATION FOR PRIOR EXPERIENCE RECOGNITION****18.1 Time window for application**

The time window within which to apply for PER status will last no longer than three months; the dates of the time window will be stated in the public invitation to apply for PER status that the ISBQPIP will issue.

**18.2** To apply for PER status, candidates shall complete the PER application form available at [www.qpip.org](http://www.qpip.org) and the supporting documentation as set out in RULE 18.2a to 18.2g.

**18.2a** The completed form and all of the supporting documentation must be submitted electronically in legible PDF format by attaching the documents to an email correspondence to be sent to the email address provided at [www.qpip.org](http://www.qpip.org)

**18.2b** The electronic transmission of the completed form and all of the supporting documentation must be date stamped no later than 11:59 pm (Central European time) on the date the three month window as specified in RULE 18.1 closes.

**18.2c** Subject to RULE 20.2, the Secretariat or a delegate thereof shall provide to the applicant an electronic confirmation of receipt of the application and supporting document within two (2) business days of receipt.

**18.2d** Subsequent to receiving the electronic confirmation of receipt, the applicant may be asked by the Secretariat or delegate thereof to provide further documentation in accordance with RULE 17.4.

**18.2e** An applicant will only be excused from meeting the deadline date of RULE 18.1, in the event of a computer failure or electronic transmission failure caused by the ISBQPIP's electronic infrastructure, a natural disaster, war, government regulation, nuclear disaster, fire, labour disputes, civil disorder within a 50 kilometre radius of the applicant's residence or place of business, or any other cause beyond the control of the applicant that would make it illegal or impossible to comply with the time requirement of RULE 18.1. In all other circumstances, the applicant's late application will be disregarded.

**18.2f** All applications for PER shall be reviewed by the Qualifications and Continued Professional Development Committee to determine if the candidate is eligible for PER.

**18.2g** The applicant will be informed in writing of the outcome of the review of his or her PER application by the Qualifications and Continued Professional Development Committee within three (3) calendar months from the date the application for PER status was deemed submitted by the Secretariat in accordance with RULE 20.2. In the event that the applicant is asked by the Secretariat or delegate thereof to provide further documentation in accordance with RULE 18.2d, then the candidate will be informed in writing of the outcome of the review of his or her PER application by the Qualifications and Continued Professional Development Committee within six (6) calendar months from the date the application for PER status was deemed submitted by the Secretariat in accordance with RULE 20.2.

- 18.3** At the time of applying for Prior Experience Recognition as indicated in RULE 17, the candidate shall pay the PER application fee specified.

[↑Table of Rules](#)

**RULE 19**                    **FRAUDULENT BEHAVIOUR RELATING TO PRIOR EXPERIENCE RECOGNITION**

- 19.1** Fraudulent behaviour is any behaviour by an applicant with the aim of obtaining an undue advantage in applying for Prior Experience Recognition including at the time of registration as a QPIP or at the time of renewing QPIP registration. Such behaviour may consist, inter alia, of presenting false documents and/or making false or incomplete statements.
- 19.2** The following measures may be taken by the ISBQPIP if fraudulent behaviour is detected after the application for Prior Experience Recognition has been received including the time of registration as a QPIP or at the time of renewing QPIP registration:
- 19.2a** Refusal to register the candidate as a QPIP for a period of time as determined by the Regulatory and Disciplinary Committee; or
- 19.2b** Suspension of registration as a QPIP for a period of time as determined by the Regulatory and Disciplinary Committee; or
- 19.2c** Refusal or revocation of registration as a QPIP indefinitely.
- 19.3** A decision concerning the options in RULE 19.2 will be made by the Regulatory and Disciplinary Committee as soon as possible after the fraudulent behaviour has been detected.
- 19.4** Any decision taken by the ISBQPIP pursuant to RULE 19 shall be based upon all the available evidence, reasoned and issued in English in writing.

[↑Table of Rules](#)

**RULE 20**                    **PER APPLICATION FEE**

- 20.1** An applicant for PER status shall pay the PER application fee in order for the application to be considered.
- 20.2** The Secretariat shall not deem the PER application to have been submitted until the PER application fee has been paid and the documentation specified in RULE 17.4 has been received by the Secretariat.
- 20.3** The Secretariat or a delegate thereof may request additional information in regard to payment of the fees indicated in RULE 20.1.
- 20.4** The PER application fee will be non-refundable. If an individual's application for PER status is rejected, then the paid fee will either be forfeited or the individual may use the paid amount towards paying the QPIP certification exams for the first time.

[↑Table of Rules](#)**RULE 21**                    **APPEALS CONCERNING PER APPLICATION REJECTION**

- 21.1** An appeal may be submitted to request reconsideration of the applicant's rejected PER application.
- 21.2** An applicant must submit the appeal in English to the Secretariat within two (2) weeks after being informed of the rejection of the application and the appeal must be accompanied by:
- (1) The appeal fee as specified in RULE 21.3; and
  - (2) Supporting documentation as specified in RULE 21.5.
- 21.3** The appeal fee shall be six (6) times the PER application fee specified in RULE 20.1 and the appeal fee shall only be refunded if the appeal is successful.
- 21.4** The Secretariat shall not deem the appeal to have been submitted until the appeal fee has been paid.
- 21.5** Supporting documentation may include additional information not previously provided to the Secretariat to substantiate the applicant's claimed compliance with the eligibility requirements of RULE 17.
- 21.6** The appeal shall be considered by the Supervisory Council and one (1) member of Qualifications and Continued Professional Development Committee.
- 21.7** A written appeal decision in English shall be rendered by the Supervisory Council within twelve (12) months from the date the appeal is deemed by the Secretariat to have been submitted.
- 21.8** The decision of the Supervisory Council in accordance with RULE 21.7 is final and is not subject to further appeal.

[↑Table of Rules](#)**RULE 22**                    **MAINTAINING QPIP REGISTRATION**

- 22.1** In order to be registered as a Qualified Patent Information Professional (QPIP), a person must pay the annual renewal fee indicated in RULE 22.4 and the person must have either:
- 22.1a** Successfully passed in accordance with RULE 15 the certification exam papers as defined in RULE 8 after having qualified to enrol for the certification exam in accordance with RULE 4; or
  - 22.1b** Been assessed and granted PER status on the basis of meeting all PER requirements as set out in RULE 17 in lieu of completing the certification exam as defined in RULE 8.

- 22.2** In order to maintain registration as a QPIP, the registrant must pay the annual registration renewal fee indicated in RULE 22.4 and the person must accumulate a minimum of ten (10) Continued Professional Development (CPD) points as specified in RULE 23.1 in each calendar year including the year in which the registrant was first registered as a QPIP.
- 22.3** For the QPIP registered via PER, the registrant must not have refused to participate as required by RULE 17.3a for three consecutive times.
- 22.4** The registration renewal fee shall be decided by the Supervisory Council and shall be published at [www.qpip.org](http://www.qpip.org) with effect from 1 January until 31 December each year.
- 22.5** A registration renewal shall not take effect until after the registration renewal fee has been paid.
- 22.6** The registration renewal fee must be paid by 30 June of each calendar year once registered as a QPIP. The renewal fee is non-refundable.
- 22.7** In the event the registration renewal fee is not paid by 31 December of the calendar year in which it is due, the registration of the QPIP shall be revoked. If the person whose registration is revoked wishes to be registered as a QPIP, the person will need to enrol for the certification exam according to RULE 5.

[↑Table of Rules](#)

**RULE 23**                      **CONTINUED PROFESSIONAL DEVELOPMENT (CPD)**

- 23.1** Once a person is registered by the ISBQPIP as a QPIP, the person becomes an associate person as defined in ARTICLE 5.1 and in order to maintain registration as a QPIP the QPIP member will be required as part of the requirements specified in RULE 22 to accumulate and keep a record of a minimum of ten (10) CPD points per calendar year in accordance with RULE 23.7.
- 23.2** If the minimum number of CPD points specified in RULE 23.1 is not accumulated within a calendar year as indicated in RULE 23.7 or insufficient information is recorded by the QPIP to substantiate the accumulation of CPD points as required by RULE 23.5c, the QPIP registration shall be immediately terminated subject to any exemptions as indicated in RULE 23.6 that may apply.
- 23.3** In the event registration as a QPIP is revoked in accordance with RULE 23.2, the candidate will be deemed eligible to enrol for the next available certification examination; the candidate shall pay the required fees and successfully complete the certification examination as set out in RULE 8.1 in order to become re-registered as a QPIP.
- 23.4** If the candidate chooses not to sit the next available certification examination or does not successfully complete the next available certification exam, the candidate

shall be permitted to apply in accordance with RULE 4 and RULE 5 for enrolment in a future certification examination.

### **23.5 Audit of fulfilment of CPD calendar year requirements**

- 23.5a** Each year the Regulatory and Disciplinary Committee of the ISBQPIP shall conduct, in accordance with RULES 3.5d and 22.1, a random audit of those listed on the QPIP Register during which those individuals notified of the audit shall provide evidence to the Committee that the minimum required number of CPD points were obtained in the previous calendar year.
- 23.5b** The random audit of QPIPs will be conducted on an annual basis from 1 April of each year and cover the 1 January to 31 December of the preceding year
- 23.5c** QPIPs are responsible for maintaining accurate and detailed records of their CPD activity including but not limited to:
- (1) Name of event or activity;
  - (2) Location of event or activity;
  - (3) Date of event or activity;
  - (4) Duration of event or activity; and
  - (5) Organiser of the event or activity.
- 23.5d** ISBQPIP will provide a template for recording the CPD points.

### **23.6 Exemption from CPD**

- 23.6a** In the event that a QPIP wishes to maintain his or her QPIP status, but is unable to meet the minimum required CPD points within a particular calendar year due to an event that required the person to cease his or her work duties for a period of six months or longer, the QPIP shall request in writing an exemption from the Regulatory and Disciplinary Committee as soon as practicable and before the end of the calendar year in question.
- 23.6b** The Regulatory and Disciplinary Committee will decide on a case-by-case basis whether to grant the exemption request.<sup>12</sup>
- 23.6c** During the exemption period, the minimum CPD point requirement will be waived by the ISBQPIP and the person's QPIP registration will be maintained so long as registration renewal fees in accordance with RULE 22.6 are paid within the applicable time limits.
- 23.6d** A single exemption may be granted for up to three calendar years<sup>13</sup>.
- 23.6e** If a QPIP requests exemption for less than three years, then the remaining portion of the three-year period is available for a future exemption request if needed.
- 23.6f** An exemption request must be for at least one calendar year. Semi-annual, quarterly, monthly, weekly exemptions or exemptions for a specified number of days totalling less than one calendar year will not be granted.
- 23.6g** If in a particular calendar year, the QPIP has obtained less than half of the required points and becomes aware that he or she will not be able to obtain the

---

<sup>12</sup> The Regulatory and Disciplinary Committee will review the request and the stated reason(s) arising from an event which may include but is not limited to voluntary or involuntary termination of employment of the QPIP, temporary assignments, temporary role changes, maternity leave, paternity leave, adoption, carer's leave, sabbatical, secondment or illness.

<sup>13</sup> In exceptional circumstances this period of time may be extended.



remaining points for that calendar year, the Regulatory and Disciplinary Committee may waive the remaining CPD point requirement for the calendar year in question if the QPIP promptly requests in writing that the Regulatory and Disciplinary Committee grant such waiver and states the reason(s) for his or her inability to obtain the remaining CPD points.

**23.6h** Extensive workload, frequent travel or similar pleadings will not be considered acceptable reasons for granting a waiver or granting an exemption.

### **23.7 Eligible CPD event/activity categories<sup>14</sup>**

**23.7a** The minimum required CPD points need to be obtained each year from at least two different groups of Groups I to IV as indicated in RULEs 23.7b to 23.7e respectively and be spread across the course of the year. Each activity listed under Groups I to IV may be counted no more than three (3) times in a given calendar year.

**23.7b** 1 point will be awarded for the following Group I activities or events:

- (1) Reading books, journal articles, conference papers, conference proceedings or online forums such as law blogs relating to patent or industrial design law, patent or industrial design information retrieval or patent or industrial design information analysis.
- (2) Acting as a peer review referee for a patent or industrial design information-related publication.
- (3) Attending remotely or in person an in-house or external presentation, lecture, training, course, workshop, seminar, webinar or national/international patent user group (or sub-group) meeting on patent or industrial design information, lasting up to one hour.<sup>15</sup>
- (4) Peer review of a patent-related search report or best practice sharing in a structured format.

**23.7c** 2 points will be awarded for the following Group II events or activities:

- (1) Attending remotely or in person an in-house or external presentation, lecture, training, course, workshop, seminar, webinar or a national/international patent user group (or sub-group) meeting on patent or industrial design information, lasting more than one hour and up to three hours<sup>15</sup>.
- (2) Evaluation and preparing a report or presentation of new patent or industrial design information tools for retrieval or analysis.
- (3) Serving as a member of the Professional Representatives Collegium (PRC).
- (4) Mentoring/coaching other patent information professionals to prepare for QPIP exams

---

<sup>14</sup> The activities listed below for each group are provided as a guide and this guide is a non-exhaustive list of all permissible activities. If in doubt as to whether an activity can be awarded points, it is recommended that the Qualifications and Continued Professional Development Committee of the ISBQPIP be contacted.

<sup>15</sup> Counting the time spent on topics related to patent or industrial design information, not on administrative topics (e.g. minutes, elections, etc.) and not counting breaks

- (5) Contributing to a special project outside the day-to-day job by providing patent information related expertise, e.g. building a database comprising synonyms, search queries, applicant relationships, supporting a user group, etc. spending at least 8 hours on the project.
- (6) Providing a **newly** developed in-house or external presentation, lecture, training, course, workshop, seminar or webinar on patent or industrial design information that lasts up to and including one hour.
- (7) Providing an update and subsequent provision of in-house or external presentation, lecture, training, course, workshop, seminar or webinar on patent or industrial design information.

**23.7d** 3 points will be awarded for the following Group III events or activities:

- (1) Attending remotely or in person an in-house or external conference, presentation, lecture, training, course, workshop, seminar, webinar or national/international patent information user group (or sub-group) meeting on patent or industrial design information, lasting more than three hours and up to six hours<sup>16</sup>.
- (2) Actively researching speakers and selecting abstracts for a program of a conference that lasts at least 3 hours.
- (3) Actively serving on the editorial committee of a patent or industrial design information-related publication.
- (4) Authoring or co-authoring a publication relating to patent or industrial design information that is published in the public domain such as a blog, a patent information user group newsletter or a company website (not peer-reviewed).
- (5) Serving as a member of the Qualifications and Continued Professional Development (Q&CPD) Committee.
- (6) Serving as a member of the Accreditation Committee (AC).
- (7) Serving as a member of the Regulatory & Disciplinary (R&D) Committee.
- (8) Serving on the board of any patent information related organisation; chairing or co-chairing a committee/working group/task force/project team within the organisation and spending up to and including 100 hours per year, but no less than 20 hours/year.
- (9) Providing a **newly** developed in-house or external presentation, lecture, training, course, workshop, seminar or webinar on patent or industrial design information that lasts between one and up to and including two hours.
- (10) Reviewing QPIP certification exam papers in support of the examination committee.

**23.7e** 4 points will be awarded for the following Group IV events or activities:

- (1) Providing a **newly** developed in-house or external presentation, lecture, training, course, workshop, seminar or webinar on patent or industrial design information that lasts more than two hours.

---

<sup>16</sup> Counting the time spent on topics related to patent or industrial design information, not on administrative topics (e.g. minutes, elections, etc.) and not counting breaks

- (2) Authoring or co-authoring a book, article or report relating to patent or industrial design information that is published in an established, peer-reviewed industry journal such as *World Patent Information*.
- (3) Attending remotely or in person an in-house or external conference, presentation, lecture, training, course, workshop, seminar, national patent information user group (or sub-group) meeting or webinar on patent or industrial design information, lasting more than six hours in content<sup>17</sup>.
- (4) Preparing QPIP certification exam papers.
- (5) Marking QPIP exam papers.
- (6) Studying for a professional qualification such as QPIP relating to patents, industrial designs or information retrieval.
- (7) Serving as a member of the Supervisory Council (SC).
- (8) Serving on the board of any patent information related organisation; chairing or co-chairing a committee/working group/task force/project team within the organisation and spending more than 100 hours per year.

[↑Table of Rules](#)

**RULE 24**                    **APPEALS CONCERNING ANY DECISIONS NOT ELSEWHERE PROVIDED FOR**

- 24.1** Unless stated otherwise, a person may on his or her behalf or behalf of an organisation appeal<sup>18</sup> before the Supervisory Council any decision taken by any committee of the ISBQPIP as specified in ARTICLE 10 by contacting the Secretariat in English in writing and following the procedures provided.
- 24.2** The appeal shall be considered in English by the Supervisory Council and one (1) member of the committee whose decision is being appealed.
- 24.3** Any decision taken by the Supervisory Council in connection with an appeal submitted pursuant to RULE 24.1 shall be based upon all the available evidence, reasoned and issued in writing as soon as possible.

[↑Table of Rules](#)

**RULE 25**                    **FINANCES AND EXPENDITURES**

- 25.1** The Treasurer will establish an annual budget proposal in accordance with Article 15.3 no later than three months (3) before the end of the preceding year.
- 25.2** After approval of the budget, the Supervisory Council shall make the budget overview available to the Professional Representatives Collegium and to all ISBQPIP

---

<sup>17</sup> Counting the time spent on topics related to patent or industrial design information, not on administrative topics (e.g. minutes, elections, etc.) and not counting breaks

<sup>18</sup> People may for instance appeal when it has been decided that they are not eligible for enrolment to the examinations because their situation is not covered by the Articles and Rules, but they still believe they should be eligible for enrolment because of other qualifications and/or experiences.

associated person by one (1) month before the end of the calendar year in which the documents are prepared as defined in ARTICLE 5.

- 25.3** The Treasurer will provide the financial statements in accordance with ARTICLE 15.4 to the auditor no later than three (3) months after the end of the financial year. The financial report from the auditor together with the annual report in accordance with Article 4.1a will be made available to the Professional Representatives Collegium no later than six (6) months after the end of the financial year.
- 25.4** Travel cost and other expenditures will be reimbursed by the Treasurer within reasonable limits and after approval by the Supervisory Council, as far as budget allows in accordance with ARTICLE 12.3.
- 25.5** Any obligation resulting in expenses above the threshold of € 200 shall first be approved by the Supervisory Council before any of the individually authorised signatories or any two of the jointly authorised signatories may authorise such an obligation.

[↑Table of Rules](#)

**RULE 26**                    **PAYMENT OF FEES**

- 26.1** Any fees payable in accordance with the Articles or Rules shall be transferred to ISBQPIP using the payment option or bank account information available at [www.qpip.org](http://www.qpip.org)

[↑Table of Rules](#)

**RULE 27**                    **OFFICIAL LANGUAGE OF ISBQPIP**

- 27.1** In accordance with ARTICLE 17, all correspondence, transactions and interaction with and within the ISBQPIP shall be in English.

[↑Table of Rules](#)

**RULE 28**                    **ENTRY INTO FORCE**

- 28.1** These Rules enter into force on 31 August 2018.