

A woman with long brown hair, wearing a dark floral dress and sandals, is walking across a vast desert landscape with rolling sand dunes under a blue sky with scattered white clouds. She is looking towards the horizon with her hand near her face.

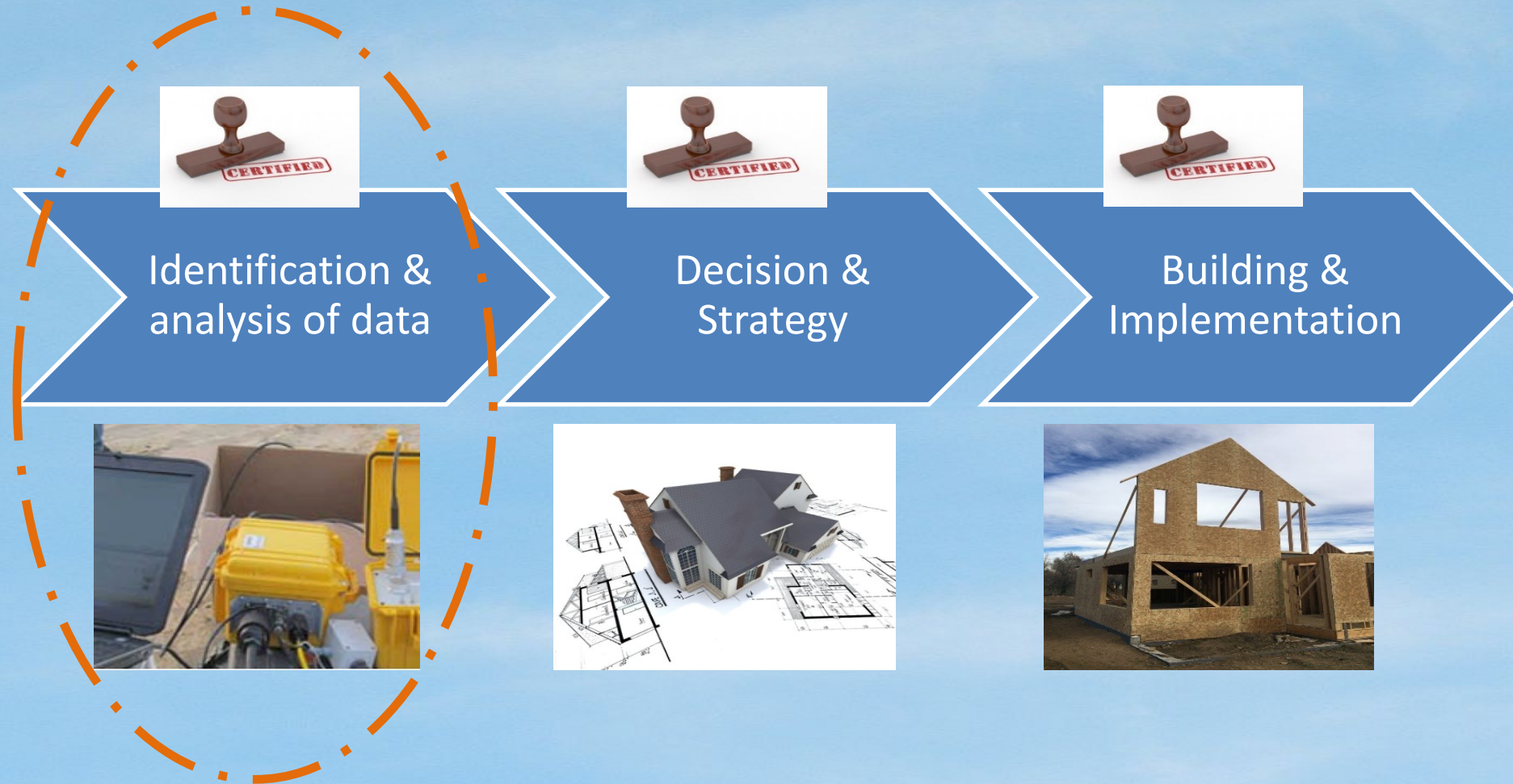
The First 5 Years

Bettina de Jong & Linus Wretblad

Representing the ISBQPIP

18th September 2023, CEPIUG 15th

So why does certification matter?



Analysis and strategic decisions?



Only as
good as
the data!





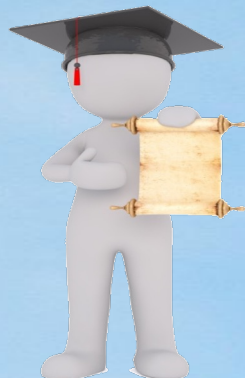
Building an innovation, typical process



Why certification is needed!







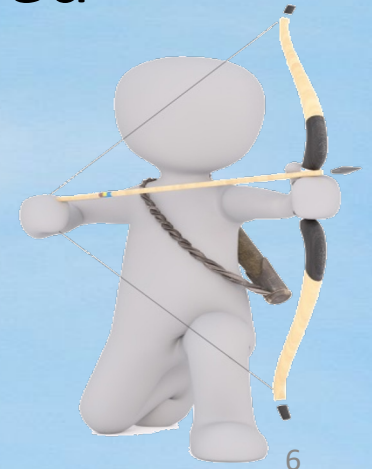
-  Ensure **professional standards** are met, covering IPR knowledge, Search & Analysis and Code of Conduct
-  Create **recognition and protection** of the patent information profession
-  Add **career opportunities** and attract newcomers to become patent information professionals



Aims of the Certification Project



-  Identify the **requirements** for being certified as a professional patent searcher
-  Create and populate a **certifying body**
-  Develop **examination papers** reflecting the skills needed
-  Review possibilities & need for **training**



A long history...



Idea of certification at EPIDOS meeting

Mock exams in London, Munich, The Hague, Stockholm and Brunswick

Second version Articles & Rules for public feedback

2002

2009

2011

2015

2017

2018

Start collaboration PDG, CEPIUG and PIUG on certification

First version Articles & Rules for public feedback

ISBQPIP officially established
(announced at CEPIUG 10th YAC)

A long history...



PER
opportunity
for Europe
and USA

PER opportunity for
ROW, except CN, JP,
IN, KR, KP

PER opportunity
for India

2018 2019

2020

2021

2022

2023

First Exam
(online)

Second
Exam
(online)

Third Exam
(online)

ISBQPIP organisation



Professional Representatives Collegium
representing organisations involved

Supervisory Council

(includes Chairperson, Vice Chairperson, Secretary, Treasurer)

Accreditation
Committee

Examination
Committee

Qualifications
and
Continued
Professional
Development
Committee

Regulatory
and
Disciplinary
Committee

Supervisory Council per 1-9-2023 *



Linus Wretblad

Chair



Susanne Hantos

Vice-Chair



Carla Scorsini

Secretary



Maurizio Bonavita

Treasurer



Takuya Saito

SC Member



Ron Kaminecki

SC Member



Anne Gandini

SC Member

- Awaiting approval from the PRC

QPIP Certification – what is it?



International Standards Board for Qualified Patent Information Professionals
attests with this Qualification Certificate that

- **Acknowledgement for experienced, all-round patent information professionals**
- **Not a (required) license to practice, but a global working role recognition**
- **Increased recognition of QPIP role and clarifies the associated skillset**

QPIPs - Who are they?



- Searchers in IP departments/patent attorney firms
- Searchers working in R&D departments
- Information professionals in patent libraries
- Examiners at patent offices
- Outsourcing agents and freelancers

QPIPs - What are their tasks?



Searching, identifying & evaluating documents for:

- Infringement/Clearance/Freedom to Operate
- Opposition/validity
- Novelty/patentability
- Legal status
- Landscaping/state of the art
- Due diligence/competitive intelligence
- Patent watches/alerts

Prior Experience Recognition



**also called “grandfathering” possible
for Patent Information Professionals with
at least 10 years of experience**






Prior Experience Recognition - Why



- PIP To recognize people's experience and commitment
- PIP To give credibility to the organization
- PIP To follow the example of other professions
- PIP To form a pool of volunteers

Prior Experience Recognition – How?



-  Apply for PER status according to Rules
-  Continued Professional Development (5 points past year)
-  Willingness to contribute to activities of ISBQPIP
-  Commitment to the Code of Conduct
-  Application fee of € 175

Prior Experience Recognition



-  December 2018 - March 2019 for Europe and USA, 280 applications of which 262 successful
-  July - October 2020 Globally except Europe, USA, China, India, Japan, South and North Korea, 9 applications of which 8 successful
-  1 September – 30 November 2023 for India, ??? applications

COMPETENCE


LEARNING


KNOWLEDGE

Continuous Professional Development



To keep the QPIP status you need to gather yearly learnings to develop as a searcher

Continuous Professional Development - Why



- QPIP To ensure continuous quality (being up-to-date)
- QPIP To prove high standards to your customers
- QPIP To follow the example of other professions
- QPIP To comply with the Code of Conduct




COMPETENCE

LEARNING

KNOWLEDGE






Continuous Professional Development – How?



-  Complete any of the activities outlined in Rules
-  Register activities in personal QPIP dashboard
-  Be prepared to be randomly audited

Continued Professional Development



-  Per 2022 ten (10) CPD points required
-  Monthly reminders (will stop when 10 points recorded)
-  Audit 10% of QPIPs plus all with <10 points
-  Each type of activity counted max 3 times in dashboard (when more, 0 points)
-  QPIPs can download PDF with their registered activities per calendar year

Continued Professional Development



QPIP working for a company where (some) travelling is allowed	CPD 10 pts	QPIP with travel restrictions/working independently	CPD 10 pts
Attending remotely or in person an internal training/meeting relating to patent information lasting more than 1 hour and up to 3 hours.	2	Reading 3 articles/books/blogs relating to patent information retrieval or analysis.	3 x 1
Attending a patent information user group meeting with more than 3 hours and up to 6 hours of content.	3	Attending 3 online webinars relating to patent information, lasting up to 1 hour (e.g. vendor, EPO, WIPO webinars).	3 x 1
Evaluation and preparing a report or presentation of new patent information tools for retrieval or analysis.	2	Attending an online conference lasting more than 6 hours in content (e.g. EPO Search Matters, HTBC, PKW etc.), or viewing recording	4
Attending a patent information vendor webinar or presentation of up to 1 hour	1	Participating (or remotely reviewing) in a national patent user group meeting with 3-6 hours of content.	3
Internal peer review of patent related search reports.	1		
Reading 1 article/book/blog relating to patent information retrieval and analysis.	1		




QPIP Examination Objective



To test whether a candidate has the knowledge to give any client (including those with no specific patent knowledge) the correct, fit-for-purpose information.




General Comments



-  Examination is conducted in English.
-  Held over two days (ca. 8 hours each day) in a controlled testing environment.
-  6 parts: 2 theory and 4 case studies




Examination Day 1



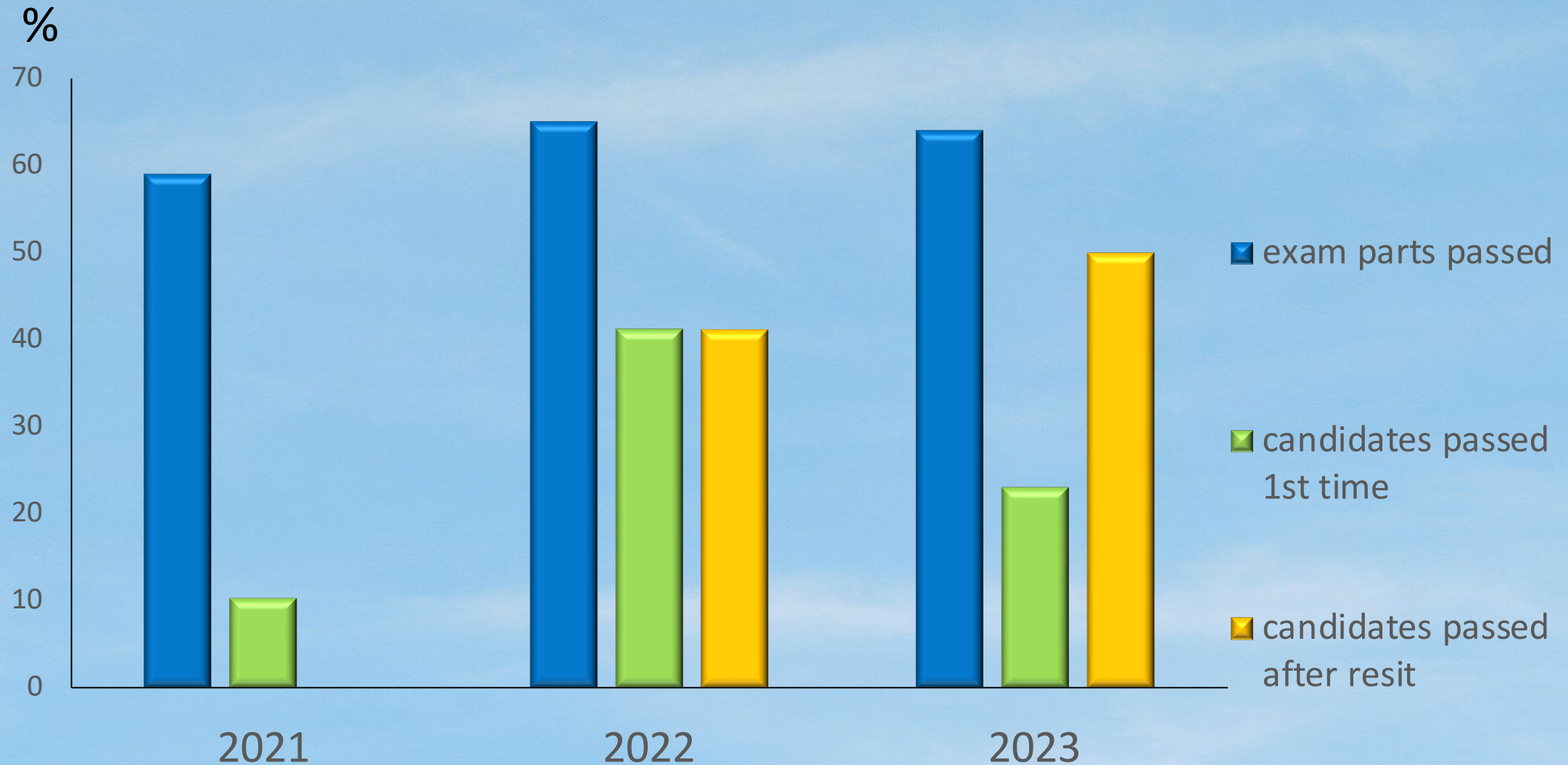
-  Opposition, validity or novelty search (develop search strategy and explain) (4 hours)
-  General theory exam: open and multiple choice questions on e.g. major patent systems, patent classifications, priority dates (short answers) (30 min)
-  Categorisation analysis (indicate if provided documents are of interest or not, and why) (3 hours)

Examination Day 2

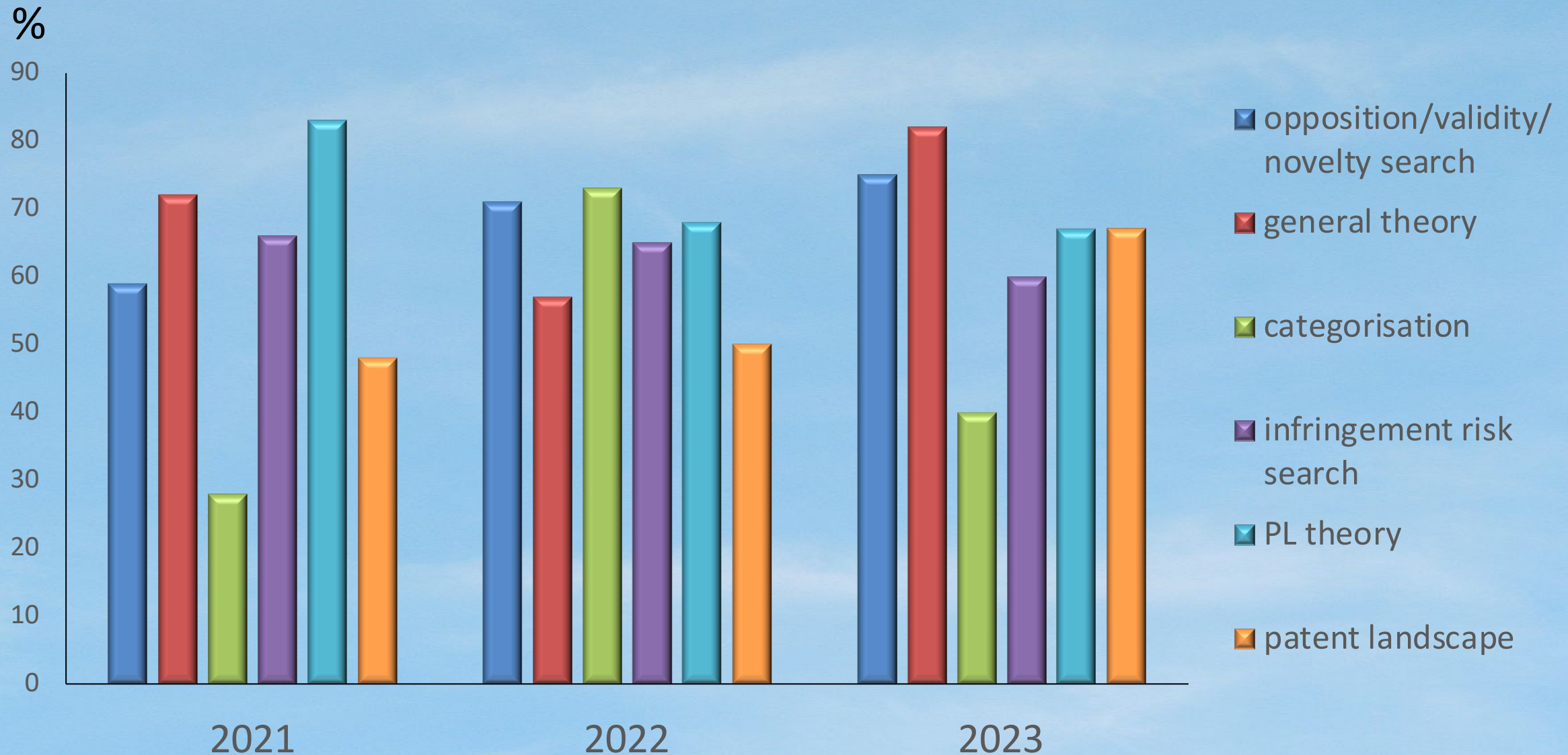


-  Patent infringement risk case study (develop search strategy and explain) (4 hours)
-  Patent Landscape theory exam: essay questions (requiring answers of max 250 words) (50 min)
-  Patent landscape analysis – statistical analysis and visualisation with provided set of patent publication numbers (3 hours)

Overview Exam Results










Overview Results per part



Markers' observations



-  Lack of explanation was most common cause for losing marks
 -  For search cases crucial for markers to understand what is done (there is not 1 way)
 -  For categorisation: to show knowledge on why publication is of interest or not
 -  For patent landscape to explain choices (e.g. on family reduction, date field, sub-categories)
-  Categorisation exam: half of the candidates did not recognise the independent claims (apparatus, method, product)
-  Patent Landscape: marks were lost for reporting part, providing insights and executive summary
-  In general, often knowledge of IPR framework is insufficient

QPIP certification strengthens the weak link



These are QPIP certification outcomes



- Ensure professional standards are met, focus on IPR knowledge, search & analysis skills and code of conduct
- Guaranteed work experience within the field
- Recognition and protection of the patent information profession
- Introduce career opportunities and attract newcomers

What does it mean in practice?



- More reliable innovation workflows
- Better transparency on expectations
- Improved efficiency and IP management
- More qualified R&D projects



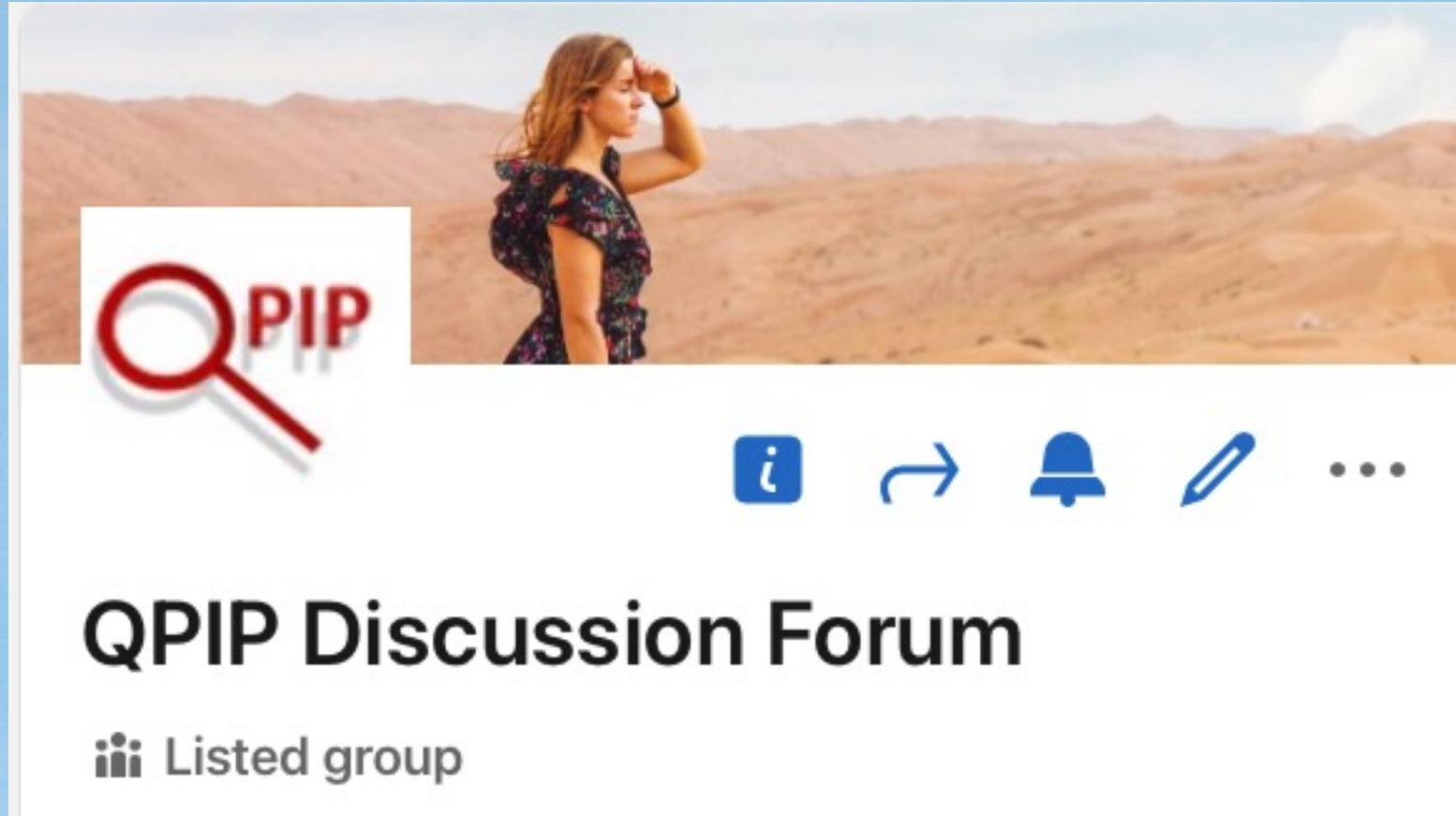
The professional title to look for



Qualified Patent Information Professional

www.qpip.org

QPIP Discussion Forum on LinkedIn



 Open to anyone in the patent area

Questions or Comments?



Susan Helliwell Commemorative Award



...for the candidate who passed the exam
with the highest number of marks...



2021 Susan Helliwell Memorial Award



**Michaela Rasmussen
Coloplast (DK)**

2022 Susan Helliwell Memorial Award



**Davinia Collyer
Victor Green UK)**

2023 Susan Helliwell Memorial Award



The 2023 Susan Helliwell award for highest number of exam marks goes to...



Ekrem Ayhan Çakay
Electrolux (SE)