

■ Findings from the Survey on Coordination of Patent Examiner Training for Small and Medium Offices

February 19, 2024

Cooperation on Examination and Training Section
PCT International Cooperation Division
Patents and Technology Sector



Survey Background Summary

Survey Background Summary (1)

- PCT/WG/14 invited the IB to conduct a survey on developing training frameworks among small and medium Offices
- PCT/WG/15 agreed to widen the focus of the survey to cover, for example, needs on training on emerging technologies and functioning as an ISA/IPEA
- PCT/WG15 also supported the creation of an independent repository of e-learning resources
- The IB conducted the survey from November to December 2023 through the PCT circular C. PCT 1658

Survey Background Summary (2)

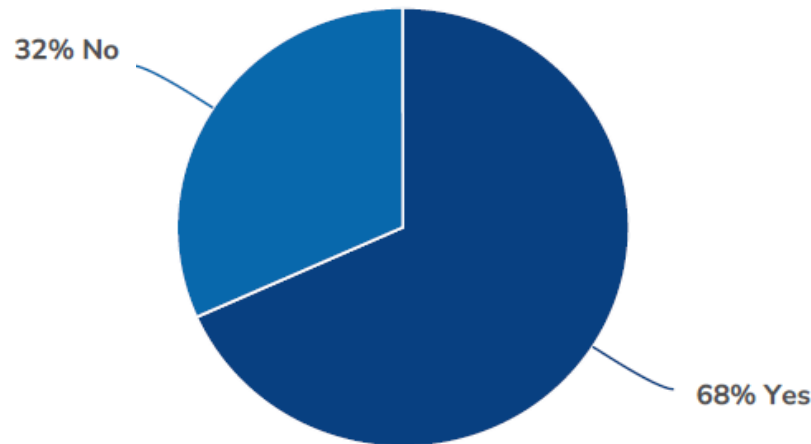
- The questionnaire intended to cover the current status at the Offices, the areas with needs for assistance, and what the IB should focus on, etc.
- The Survey was also addressed to larger Offices, as well as small and medium Offices, to seek possibilities of assistance networks among Offices and to learn from what Offices have in place for patent examiner training
- There were 93 responses, partial or complete



Survey main findings

Number of patent examiners

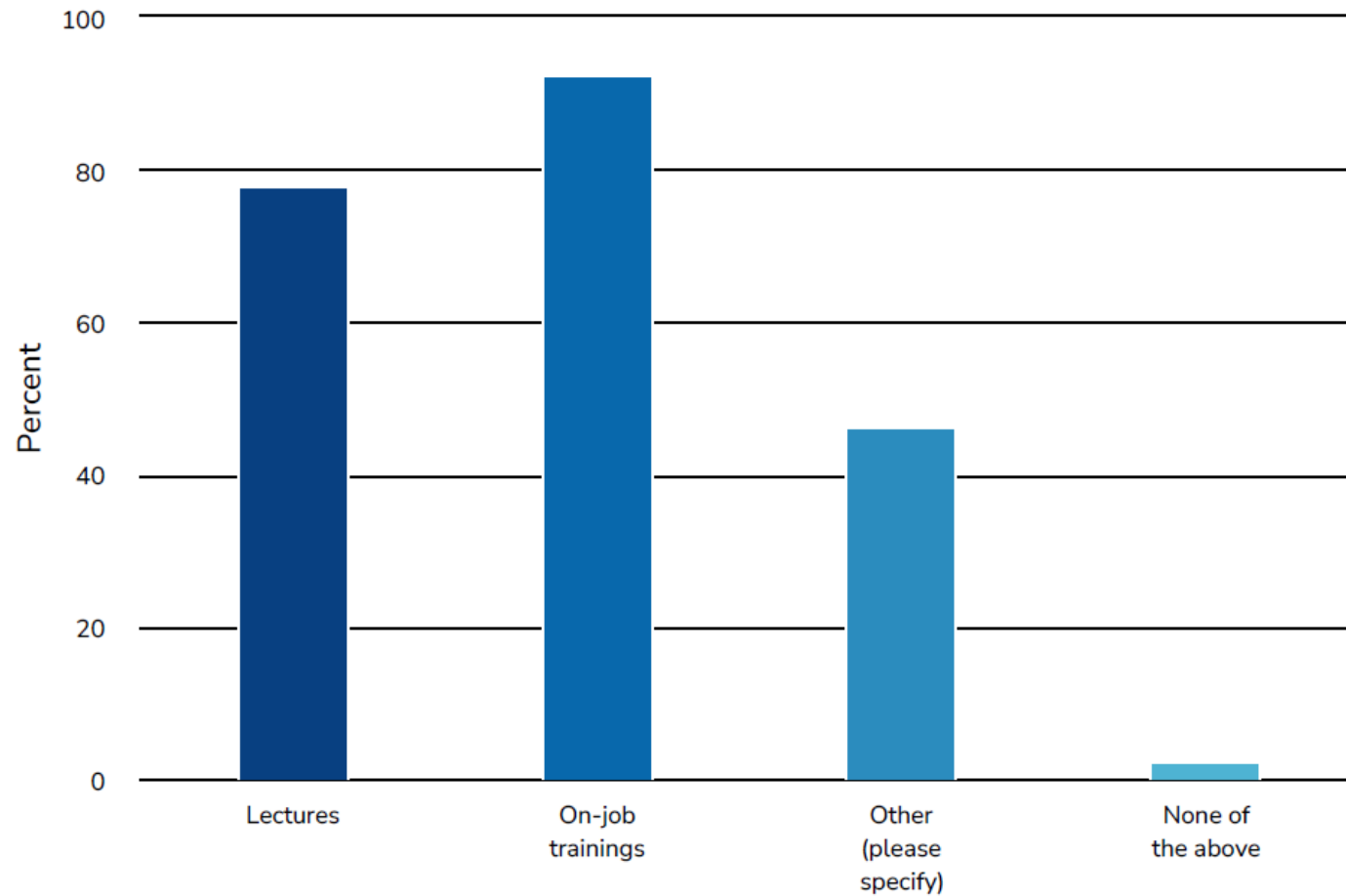
- The number of patent examiners varied: ranging from 2 to more than thousands. 59% of the respondents had less than 100 examiners
- 68% of respondents have plans to increase the number of examiners



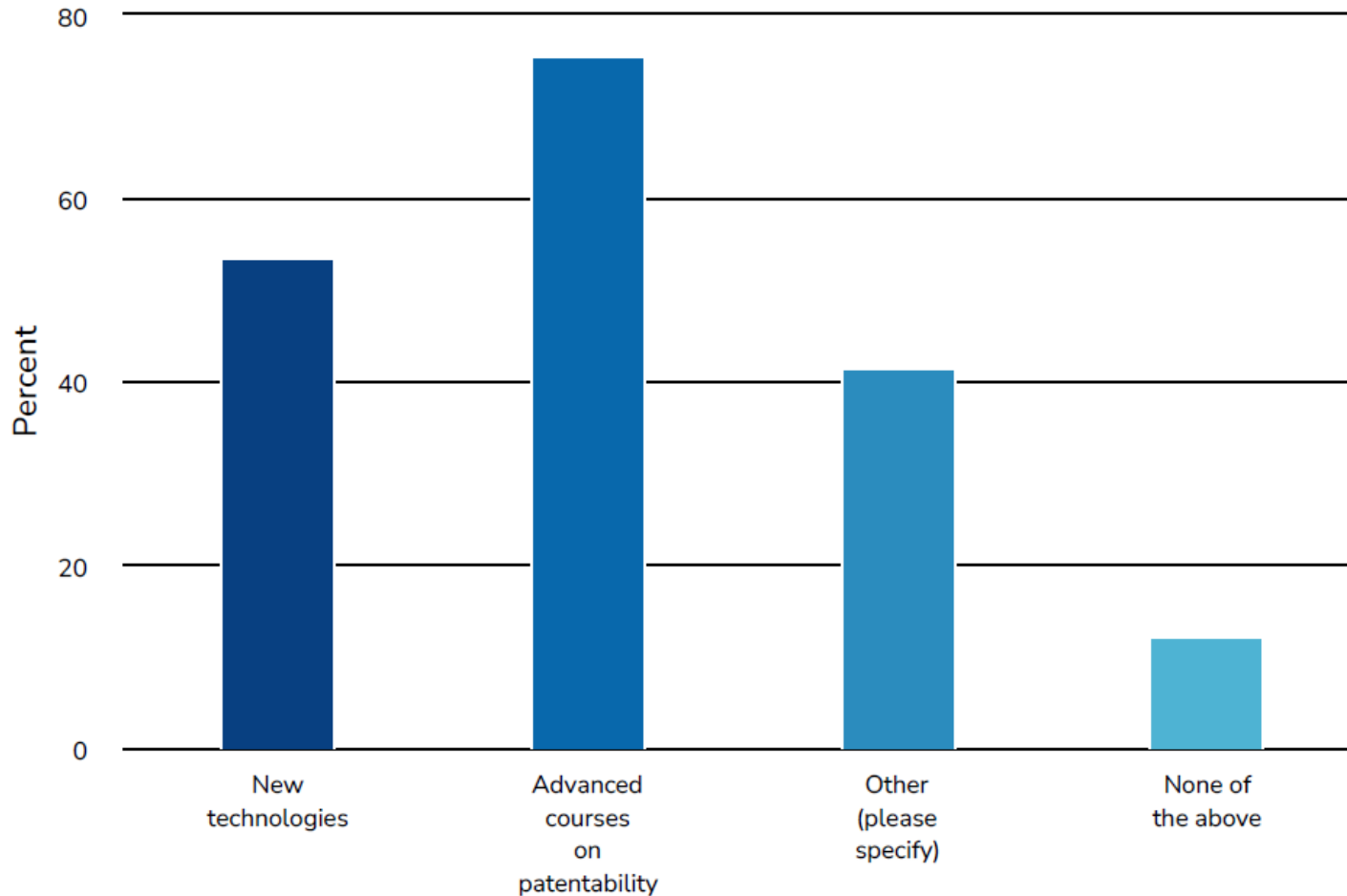
Search tools and databases

- Epoquenet, Espacenet, PATENTSCOPE and Google Patent are found to be the most widely used search tools across the responding Offices
- There are also Offices using their own tool or other tools available from other Offices
- Many Offices are using more than one search tools
- Databases such as IEEE or STN are also consulted, more often but not only by bigger Offices

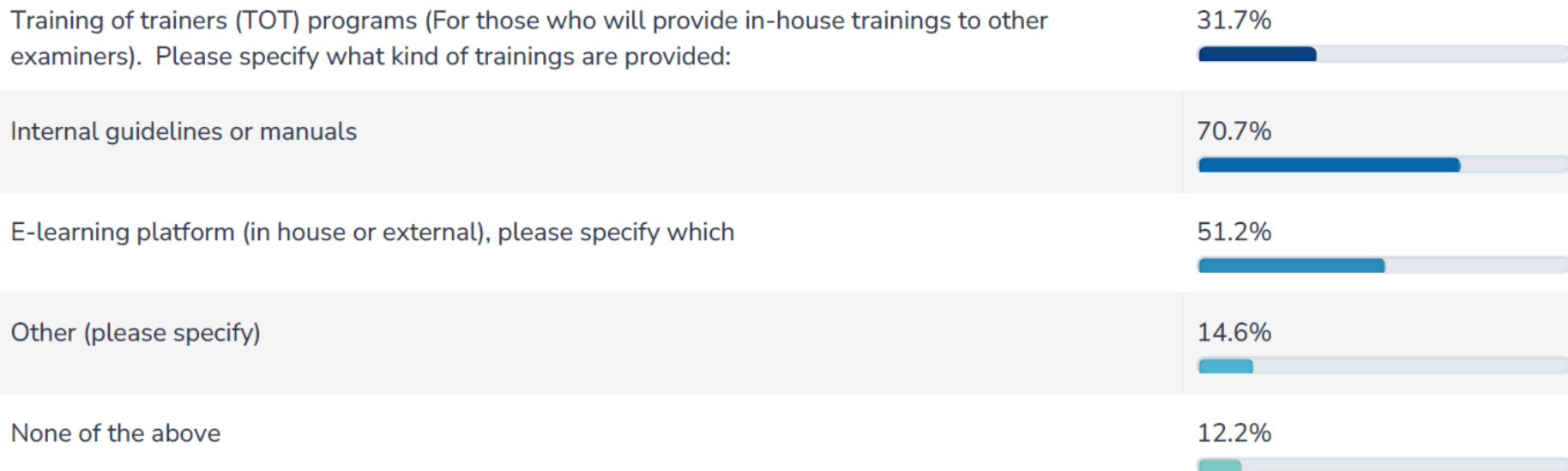
Training of newly recruited patent examiners



Training of experienced examiners



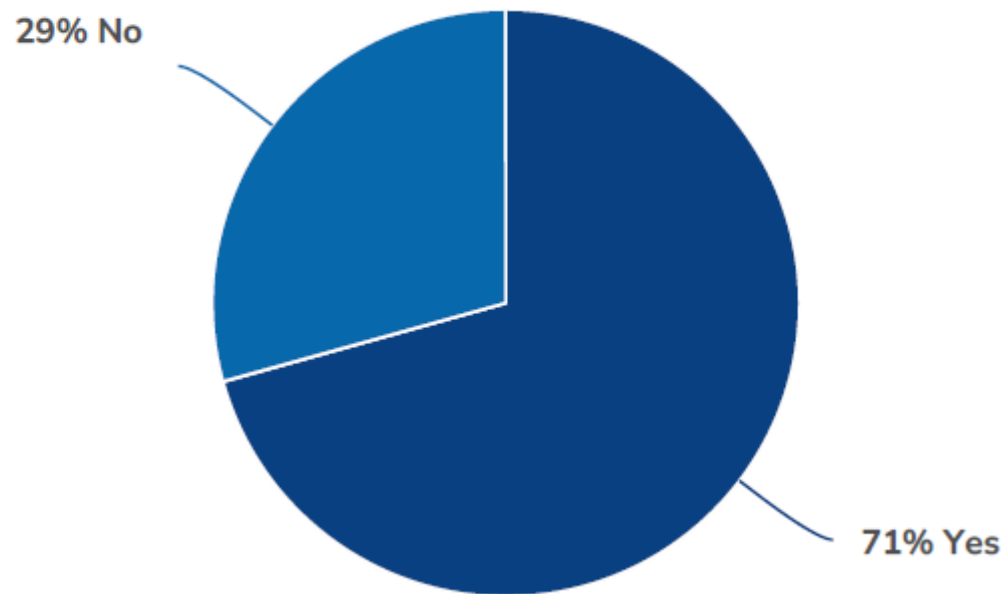
Additional types of training



Reasons for lack of training programs

- Insufficient number of examiners to adopt “train-the-trainer” or establish internal guidelines
- Inadequate expertise and shortage of financial and human resources
- Legal situation such as on-going amendments
- Relying on the external assistance
- Strategic decision based on current needs and priorities

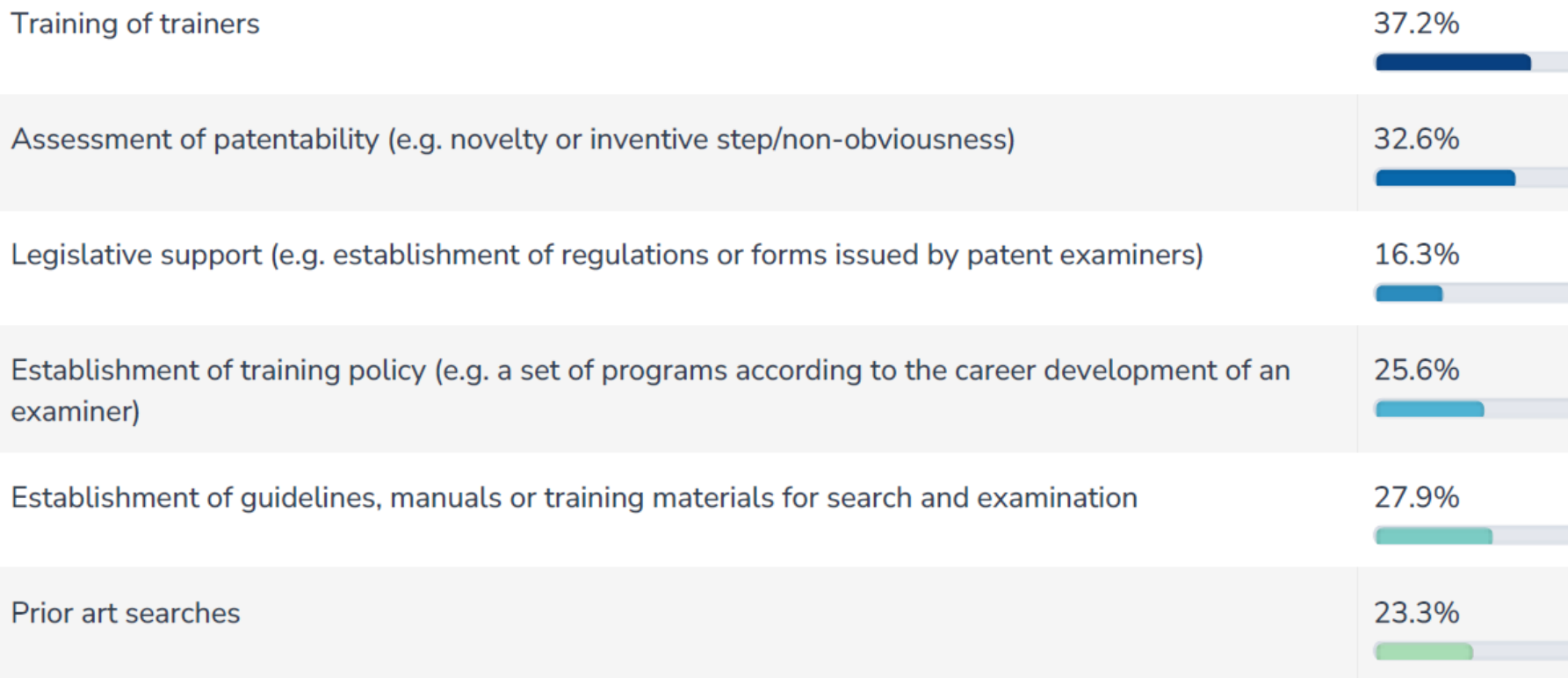
Offices with training policy



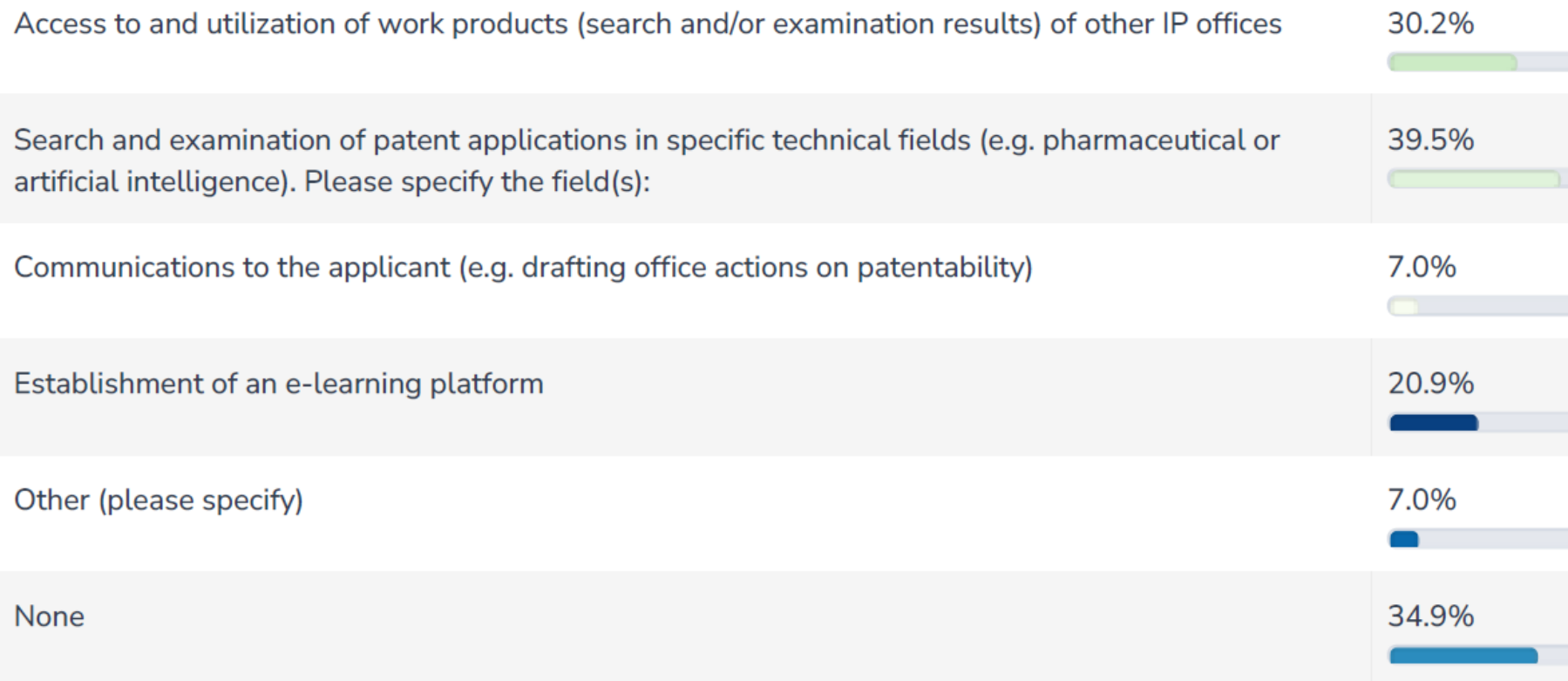
Training Policy in place at some of the responding Offices

- Many Offices have specific programs for new examiners, often for more than one year and/or competency-based
- Annual analysis on the needs of training on different technologies
- Examiners have to continue to educate themselves and they are requested to draft a plan of education every year
- 4 sub-types of training: Recruitment, Retention, Engagement and Development

Areas where External Assistance is needed (1)



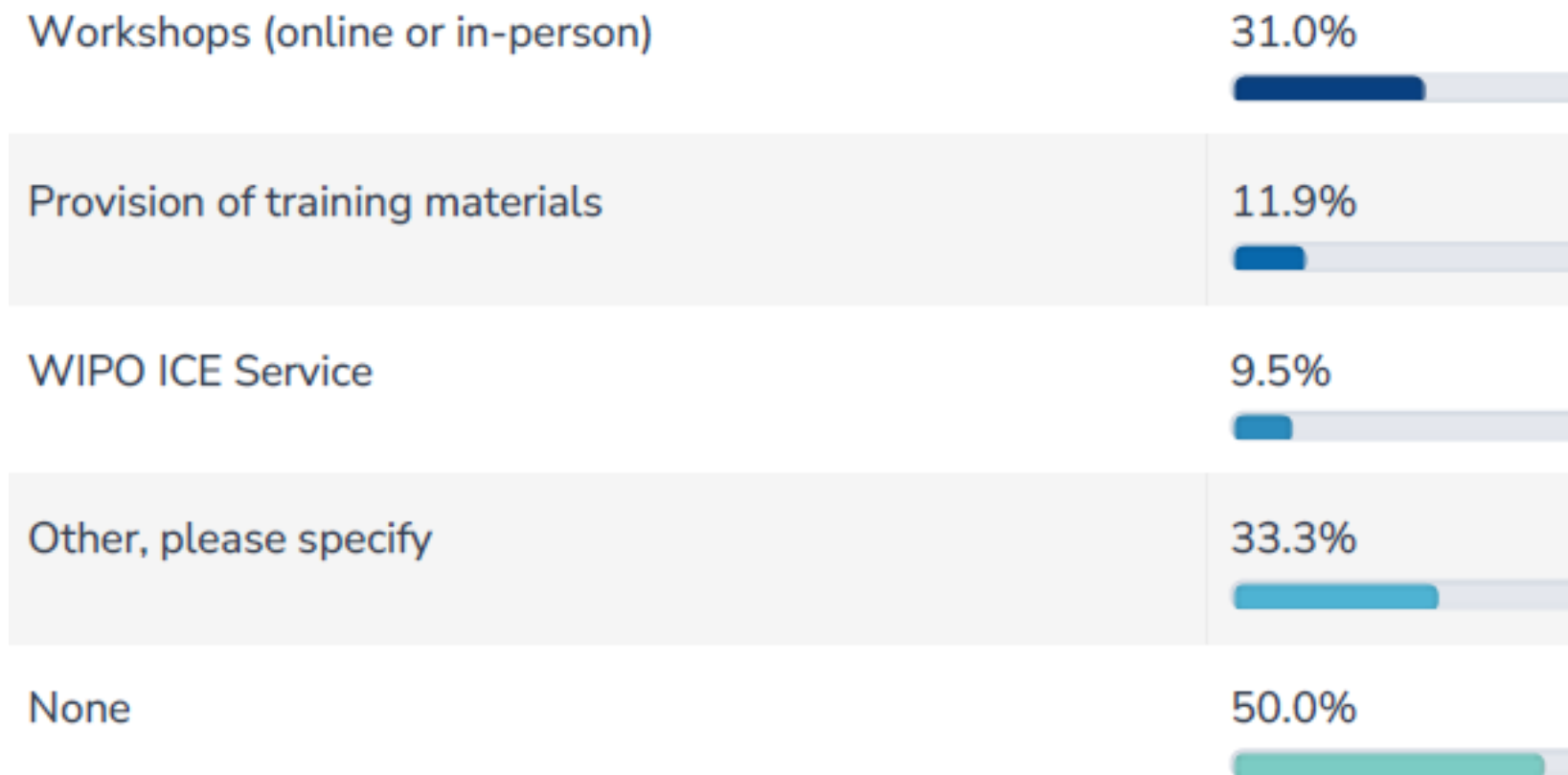
Areas where External Assistance is needed (2)



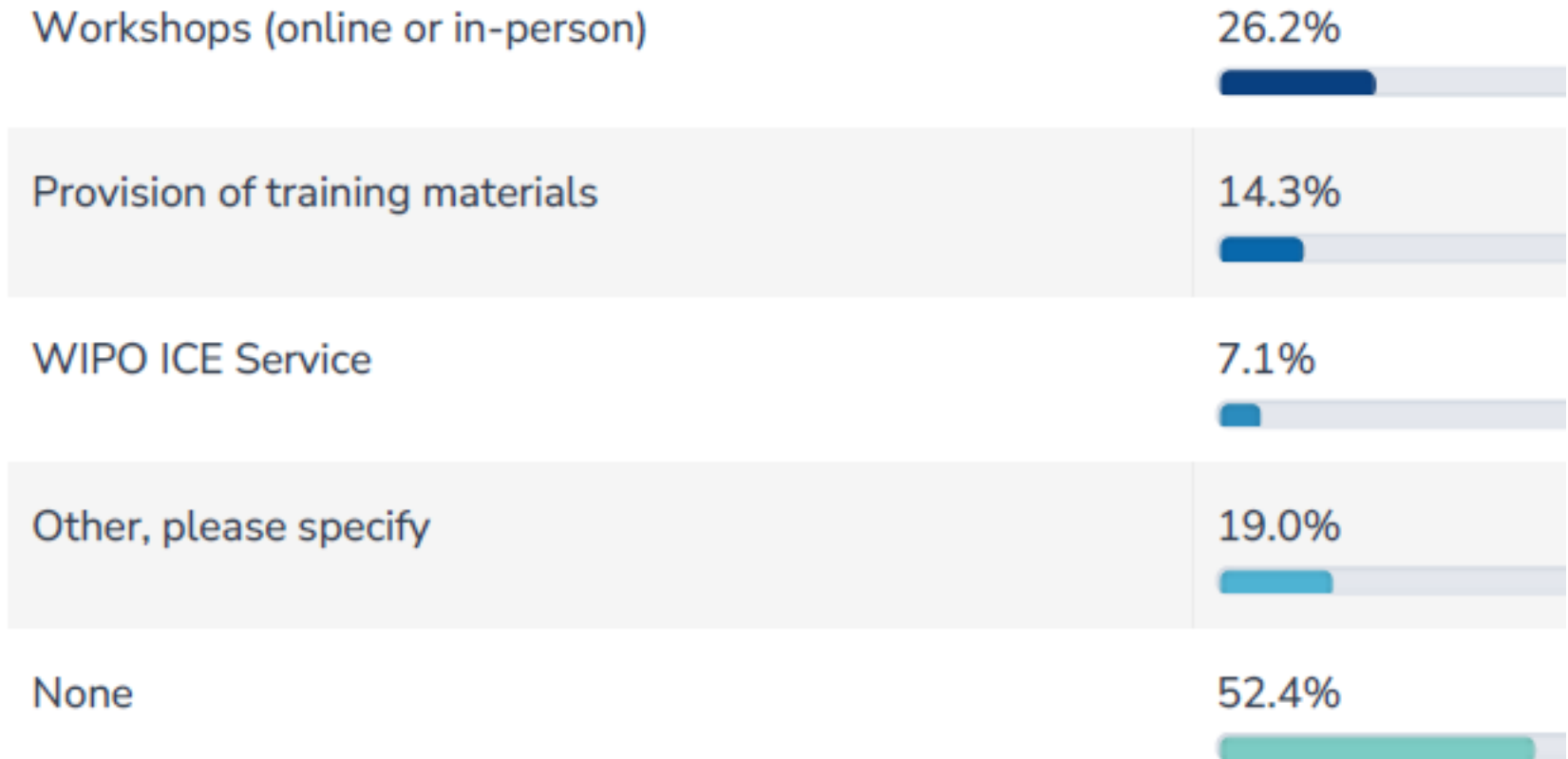
Training Needs for ISA/IPEA

- Some Offices expressed needs for opportunities to exchange best practices with other ISA/IPEAs, trainings on ePCT and PCT Rules
- There was support by most responding Offices on the idea of central management of training among ISA/IPEAs, some of them hoping for better coordination to match training needs and/or reduce discrepancies in practices

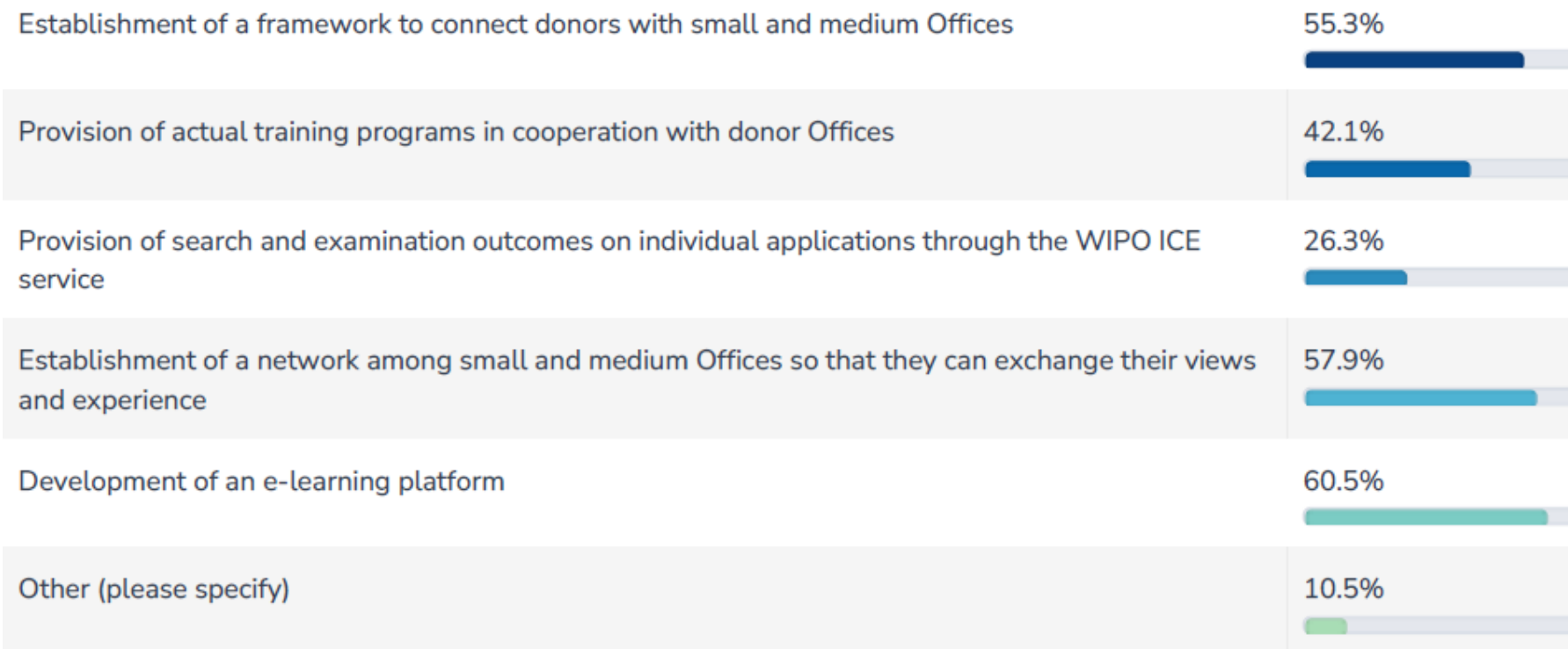
Current support provided by Offices



Additional support Offices are willing to provide



Areas for enhanced efforts from the IB



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