

**Responding Office:**

Name of contact person:

Position:

Email address:

**Part A: TRAINING PROVIDED TO SUBSTANTIVE PATENT EXAMINERS OF OTHER OFFICES IN 2016**

Tables A1 to A5 are only to be filled by Offices (“donor Offices”) which, in 2016, have provided training in substantive patent examination for the benefit of examiners from other Offices or which have contributed to the provision of such training activities (for example, by making available experts or other resources) where such activity was organized by another Office, WIPO and/or other organizations.

**Table A1 - Medium to Long-term Comprehensive Training Programs<sup>1</sup> in 2016:** Please indicate in the Table below any medium to long-term comprehensive training programs organized or co-organized by your Office in 2016 or to which your Office has contributed (by making available experts or other resources). If a certain program was repeated, please indicate each individual intake of examiners.

Starting date	Date of (expected) completion	Name of program	Beneficiary Office(s) (Number of their examiners included in program)	Organizing, co-organizing or contributing institution(s) other than your Office (if any)

<sup>1</sup> A medium to long-term comprehensive training program consists of a combination of several consecutive, distinct training units that are meant to transfer knowledge and to develop a set of skills of a patent examiner over an extended period of time. The combination of distinct units may comprise traditional face-to-face classroom-type training, distance learning modules, webinars, virtual lectures, study visits or on-the-job training, i.e. a training approach that is frequently termed blended learning. The RPET program of the ASEAN-Australia-New Zealand Free Trade Area (AANZFTA) is an example of such a medium to long-term training comprehensive program: <http://www.ipaustralia.gov.au/about-us/international-activity/asia-pacific-development-cooperation/Regional-Patent-Examination-Training-RPET/>. A regular class-room type workshop that simply extends over 2 weeks or more does not qualify for this category of training activity.

**Table A2 - On-the-job Training<sup>2</sup> in 2016:** Please indicate in the Table below any on-the-job patent examiner training activities organized or co-organized by your Office in 2016 or to which your Office has contributed (by making available experts or other resources), and which have been conducted face-to-face either in the premises of your Office or in the premises of a beneficiary Office, or which included remote one-to-one mentoring (other than any activities related to medium to long-term comprehensive training programs covered in Table A1, above, which may include OJT as one of several combined training units).

For any training activity that has received at least partial funding through a Funds-in-Trust agreement with WIPO, please indicate so in the column 'Topic'.

Year/month	Venue (indicate 'remote' if applicable)	Duration	Topic	Beneficiary Office(s) (Number of its examiners included in activity)

<sup>2</sup> On-the-job training is characterized in that examiners perform, under the supervision of an experienced examiner (one-to-one mentoring), certain tasks that are part of the substantive examination of pending (life) applications. Training including only case studies (for example formerly pending cases or derivatives thereof) is not covered by this question.

**Table A3 - In-house Training Accommodating Guest Trainees in 2016:** Please indicate in the Table below any in-house patent examiner training activities organized primarily for examiners of your Office in 2016 in which substantive patent examiners from other Offices were accommodated as guest trainees (other than any activities related to medium to long-term comprehensive training programs covered in Table A1, above, which may include OJT as one of several combined training units).

Year/month	Topic	Beneficiary Office(s) (Number of its examiners included in training)

**Table A4 - Classroom-type Training<sup>3</sup> in 2016:** Please indicate in the Table below any classroom type training activities that were organized primarily for the benefit of substantive patent examiners from other Offices and which your Office has organized, co-organized in 2016 or to which it has contributed, either in the premises of your Office or in other locations (other than any activities related to medium to long-term comprehensive training programs covered in Table A1, above).

Year/month	Venue	Duration	Topic	Beneficiary Office(s) (Number of its examiners included in training)

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<sup>3</sup> For the purpose of this survey, a classroom type training event is conducted face-to-face and requires the physical presence of trainers and trainees, such as workshops or seminars. It comprises a set of lectures on related topics, and may further include exercises or case studies. Examples would include workshops or seminars on patent classification, on patent drafting, search strategies, foundations of the IP system etc. Training events establishing a virtual classroom like online seminars (webinars) are not covered by this table, see table A5.

**Table A5 - Online Seminars in 2016:** Please indicate in the Table below any training activities that were organized as online (web-based) seminars (webinars) primarily for the benefit of substantive patent examiners of other Offices and which your Office has organized, co-organized or to which it has contributed (other than any activities related to medium to long-term comprehensive training programs covered in Table A1, above).

Year/month	Duration	Topic	Beneficiary Office(s) (Number of its examiners included in training)

**Table A6 - Shared Training Materials and Media:** Please indicate in the Table below any training materials or media<sup>4</sup> that your Office has developed and that has or can be used for self-study by substantive patent examiners, such as distance learning courses, recorded webinars or case studies which are available to patent examiners of other Offices (either publicly or not), or could be made available (if necessary, by way of a translation).

Type (distance learning course, webinar, etc.) and topic	URL if accessible online

Please indicate a contact person and contact details for obtaining further information:

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<sup>4</sup> For example, distance learning courses, recorded webinars, exercises or case studies used in workshops/seminars, etc.

**Textbox I – Increased Training Opportunities Offered by Donor Offices**

Textbox I should be filled in by all donor Offices to inform the International Bureau whether they will be in a position to provide more training activities of the type referred to in paragraph 7(a), (b) and/or (c) of the main body of the Circular, in 2017 or later. The International Bureau will compile any information received in response to this invitation for information of the PCT Working Group at its 2017 session (see paragraph 8 of the main body of the Circular).

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**Textbox II – Setting Up or Expanding Existing Fund-in-Trust Arrangements by Donor Offices**

Textbox II should be filled in by all Offices of Member States which are able to fund training activities to inform the International Bureau whether they will be in a position to set up Fund-in-Trust arrangements, or expanding existing Fund-in-Trust arrangements, with a view to making additional funds available for the provision of training of examiners from developing countries, in 2017 or later. The International Bureau will compile any information received in response to this invitation for information of the PCT Working Group at its 2017 session (see paragraph 10 of the main body of the Circular).

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**Part B: SUBSTANTIVE PATENT EXAMINER TRAINING RECEIVED BY EXAMINERS OF YOUR OFFICE AND PROVIDED BY OTHER OFFICES IN 2016**

Tables B1 to B5 are only to be filled in by Offices whose examiners, in 2016, have received training in substantive patent examination organized by other Offices, WIPO and/or other organizations (“beneficiary Offices”).

The replies should cover all relevant activities carried out in 2016, including those that have started in 2016 and will be completed later.

**Table B1 - Medium to Long-term Comprehensive Training Programs<sup>5</sup> in 2016:** Please indicate in the Table below any medium to long-term comprehensive training programs in which examiners of your Office have participated as trainees in 2016. If a certain program was repeated, please indicate each individual in-take of examiners.

Starting date	Date of (expected) completion	Organizing Office	Name of program	Number of examiners from your Office having participated

<sup>5</sup> A medium to long-term comprehensive training program consists of a combination of several consecutive, distinct training units that are meant to transfer knowledge and to develop a set of skills of a patent examiner over an extended period of time. The combined distinct units may comprise traditional face-to-face classroom-type training, distance learning modules, webinars, virtual lectures, study visits or on-the-job training, i.e. a training approach that is frequently termed blended learning. The RPET program of the ASEAN-Australia-New Zealand Free Trade Area (AANZFTA) is an example of such a medium to long-term training comprehensive program: <http://www.ipaustralia.gov.au/about-us/international-activity/asia-pacific-development-cooperation/Regional-Patent-Examination-Training-RPET/>. A regular class-room type workshop that simply extends over 2 weeks does not qualify for this category of training activity.

**Table B2 - On-the-job Training**<sup>6</sup>: Please indicate in the Table below any on-the-job training which examiners of your Office have received in 2016 and which was organized by another Office or WIPO and which has been held face-to-face either in the premises of your Office or other Offices, or which has included remote one-to-one mentoring (other than on-the-job training or one-to-one mentoring related to medium to long-term comprehensive training programs covered in Table B1, above).

Year/month	Venue (indicate 'remote' if applicable)	Duration	Topic	Number of your examiners participating in training activity

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<sup>6</sup> On-the-job training is characterized in that examiners perform, under the supervision of an experienced examiner (one-to-one mentoring), certain tasks that are part of the substantive examination of pending (life) applications. Training including only case studies (for example formerly pending cases or derivatives thereof) is not covered by this question.

**Table B3 - Offshore Training:** Please indicate in the Table below any patent examiner training activities in 2016 that **required travel** of your examiners (other than activities related to medium to long-term comprehensive training programs, or on-the-job training covered in Tables B1 and B2, above).

Year/month	Venue	Organizing Office	Topic	Number of examiners from your Office

**Table B4 - Domestic<sup>7</sup> Training with External Assistance:** Please indicate in the Table below any domestic training activities for patent examiners of your Office in 2016 that your Offices organized in collaboration with other patent Offices or WIPO or in which experts from other Offices or WIPO participated (including such in which examiners from other Offices participated) (other than activities related to medium to long-term comprehensive training programs or on-the-job training covered in Tables B1 and B2, above); domestic training activities without external assistance should not be listed.

Year/month	Assisting/collaborating Office(s)	Topic	Number of examiners from your Office, from other Offices

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<sup>7</sup> Irrespective of whether examiners from other Offices participated as trainees as well. The only difference between classroom-type events covered by Table B3 and the present Table is the location where the event was organized. The distinction is made because an event held in the premises of a hosting Office would permit participation of a greater number of examiners of the hosting Office and may potentially yield a stronger effect on the examination capacities of the hosting Office.

**Table B5 - Distance Learning:** Please indicate in the Table below any distance learning courses (for example, such of the WIPO Academy), or (live or recorded) online seminars (webinars)(for example, WIPO's PATENTSCOPE webinars), or similar virtual classroom training events offered by other patent Offices, WIPO or other institutions, that are either mandatory for examiners of your Office to take or that you recommend to examiners of your Office (other than activities related to medium to long-term comprehensive training programs covered in Tables B1, above).

Provider	Type (webinar or self-study course) and topic	Mandatory/Recommended

**Part C:**

**Textbox III - CURRICULA<sup>8</sup> AND/OR COMPETENCY MODELS<sup>9</sup>**

Textbox III should be filled in by all Offices that have developed any curricula and/or competency models for the training of their substantive patent examiners and are willing to share such curricula and/or competency models, with a view towards preparing a compilation of such competency models to develop an inventory of various competencies that may be required for substantive patent examiners in Offices of various sizes. Such Offices are invited to attach such curricula and/or competency models to their replies to this Circular, or alternatively indicate in Textbox III a contact for retrieving such curricula and/or competency models (see paragraphs 13 and 14 of the main body of the Circular).

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[End of Annex and of Circular]

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<sup>8</sup> A training curriculum (for example, for newly recruited future examiners) consists of a set of individual training modules (seminars, workshops, webinars, distance learning courses, materials for self-study, etc.) on topics considered to be relevant for a substantive patent examiner. A training curriculum may be based on an explicit competency model and different training modules would then be designed to convey respective knowledge and train certain skills defined by the competency model. A training curriculum may draw on both internal and external training resources.

<sup>9</sup> A competency model consists of an inventory of knowledge and skills required for a substantive patent examiner to efficiently deliver the performance defined by her/his job description.