



CIPA

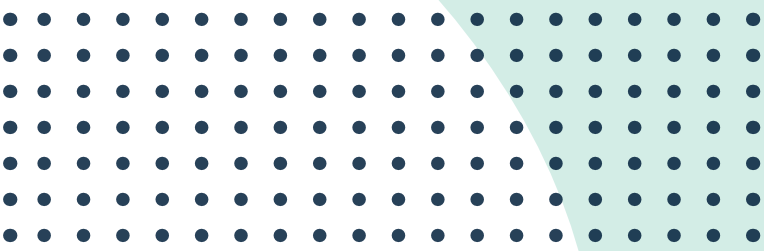
THE CHARTERED
INSTITUTE OF
PATENT ATTORNEYS

Student Handbook

22 November 2024

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1. Introduction

by the CIPA President

A very warm welcome as you embark on your training towards becoming a patent attorney. Congratulations on joining an exciting and international profession. I am proud to be part of this profession, and I hope that you will be too. As a trainee you will learn all you need to know about the law and its practice, to advise your clients, whether in private practice or in industry. Advancing your clients' business needs will be your goal throughout your career, as you work with inventive and creative people to make the most of their IP rights.

During your journey from new trainee to qualified attorney and beyond, no matter who you work for or what type of clients you serve, the Chartered Institute of Patent Attorneys (CIPA) will be there to guide, support and represent you. CIPA is your professional body. We are delighted to have you as a member.

CIPA's membership extends beyond the patent attorney profession and includes IP paralegals, IP solicitors and barristers, and judges, as well as IP professionals outside the UK. As one of those members, you will have the chance to help shape what the Institute does: its policies, its strategies, its impact and its services to members. CIPA, as a membership body, is governed by its members who serve on its Council, and by its many specialist committees, supported by senior practitioners to the newest recruits, which are instrumental in all CIPA's activities. CIPA membership has four key benefits. We capture them with the acronym 'SILC':

- Status: the title 'Chartered Patent Attorney' (CPA) commands world-wide respect and trust: part of CIPA's job is to protect and promote this reputation and ensure that high standards are maintained throughout the UK profession.
- Influence: CIPA regularly engages with law makers and policy makers both at home and abroad, speaking out for the UK profession and its clients. Its collective voice can be heard much louder and more powerfully than any individual attorney or firm. We know it makes a difference.



1. Introduction by the CIPA President

- Learning: both during your training and after qualification, you will need access to good quality, cost-effective and properly tailored training resources, to allow you to develop and maintain high professional standards. CIPA will help you: it delivers training events, textbooks and training manuals, professional guidance and constant updates and analyses on matters of interest to the IP attorney. By professionals, for professionals.
- Community: perhaps most important, CIPA provides a community for you to feel part of. Ours is a small profession, but its members respect and support one another. They share resources and expertise (and fun) for the greater good. CIPA is the focal point around which that community is built, and the reason it continues to thrive.

It is through the Informals that you will first begin to feel part of the CIPA community. It is where you will receive guidance and support (and friendships) during the early part of your career. The Informals will provide you with training resources: exam tutorials, lectures and seminars as well as organising social events that allow you to meet, and share experiences with, others in your position. Please get involved with the Informals and please participate in the activities they run.

Look further into this handbook – it is just a part of what the Informals do for new entrants to the profession – and you will find valuable information to get you started. It reflects the warmth of the welcome you will receive from the Informals, and indeed from all CIPA colleagues, wherever you go. I am full of admiration for the people who have worked so hard to put it together, and hope that one day you too will feel able to contribute to the CIPA community in similar ways. The work of a patent attorney is often challenging. The environment we operate in brings more interesting (and exciting) challenges, from the practical to the political, where emerging policies from governments at home and abroad often impact on our work and that of our innovative clients. CIPA is here to help you meet your professional challenges and to work in your interests to ensure the IP system is the very best it can be. Last, but certainly not least,



1. Introduction by the CIPA President

CIPA recognises that trainees come from many and varied backgrounds. Inclusivity is fundamental to CIPA's activities, and we work with IP Inclusive to make the IP community more equal, diverse and inclusive. Please take a look at IP Inclusive's work and draw on the support it offers. I wish you every success in your career and look forward to working with you.

Finally, please remember the CIPA isn't a faceless organisation, it is a collection of people, most of whom are volunteers, who work together to advance the interests of the patent attorney profession. Feel free to get in touch with CIPA whenever you feel we can help or, even better, when you think you might be able to help. Without the engagement of our members CIPA cannot do the many great things that it does. It is those members that make CIPA - members just like you.

Matt Dixon
CIPA President 2024



2. Introduction to this Booklet

Welcome to CIPA! This booklet is your go-to guide as a new trainee patent attorney. Here's what you can expect:

- Get to know CIPA: Discover what CIPA and the Informals are all about. Learn how you can get involved and make the most of your membership.
- Training tips: Find essential information and resources to help you navigate the early years of your patent profession journey.

When an employer hires a new trainee, it commits to training and supporting that trainee throughout their career, both pre- and post-qualification. This booklet aims to help you and your employer find the resources needed to meet these responsibilities. The Informals believe it is the employer's duty to guide you as you work towards becoming a qualified patent attorney.

Be advised

The information in the printed version of this booklet can become outdated, so always check for the most current details. The latest version is available on the [CIPA website](#), and our blog, the [Yellow Sheet](#), is regularly updated with new information.

For the best experience, use the online or PDF version of this booklet to take advantage of embedded hyperlinks. If you notice any errors or have suggestions for improvements, please reach out to us at informalsyellowsheet@gmail.com. We plan to update this booklet at least once a year.

Welcome aboard, and here's to your success in the patent profession!



3. Introduction to CIPA



The Chartered Institute of Patent Attorneys (CIPA) is the professional representative body for patent attorneys in the United Kingdom. CIPA was founded in 1882 and was incorporated by Royal Charter in 1891. CIPA represents over 2,800 chartered patent attorneys, in private practice and industrial departments. Total membership is over 4,700 and includes trainee patent attorneys, IP paralegals and other IP professionals.

CIPA is designated as the approved regulator for the patent attorney profession under the 2007 Legal Services Act (LSA) and the keeper of the Register of Patent Attorneys under the 1988 Copyright, Designs, and Patents Act (CDPA). CIPA delegates its regulatory responsibilities to the Intellectual Property Regulatory Board (IPReg). The Patent Examination Board (PEB) is a self-governing committee of CIPA, accredited by IPReg to oversee the administration and quality assurance of the examinations required to be entered onto the Register of Patent Attorneys, and become a Fellow of CIPA and a Chartered Patent Attorney (CPA).

CIPA is the UK's leading professional and representative body for IP professionals practising in patents, designs, trade marks and other forms of intellectual property. CIPA is responsible for promoting the education, standing, training and continuing professional expertise of IP professionals and for establishing, maintaining and enforcing high standards of professional conduct and compliance with the law. CIPA achieves this through:

- democratic governance by its members, via a Council of 27 elected representatives, and committees covering the full range of IP policy and practice areas;
- providing the profession with opportunities for continuing professional development (CPD), via an annual programme of highly relevant seminars, webinars and other educational events;
- acting as the principal advocacy body for the profession, with a range of public affairs activities aimed at influencing policy formers and decision makers in the UK and internationally;
- creating a knowledge hub, through the publication of its Journal and a series of textbooks and guides through which its members stay up to date with IP law and practice; and
- supporting the professional community through its social programme, including regional events, special interest groups and informal networking opportunities.

Lee Davies
CIPA Chief Executive

4. Introduction to the Informals

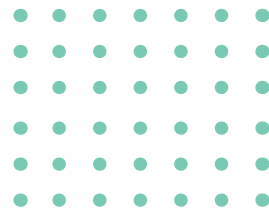
The Informals is a group for the student members of CIPA, primarily comprising trainee patent attorneys who are new, partially qualified, or single qualified in the UK or Europe. It also welcomes recently dual-qualified European Patent Attorneys (EPAs) and Chartered Patent Attorneys (CPAs). All CIPA student members automatically become members of the Informals, making prompt payment of CIPA student membership crucial. Often, employers cover this fee. Trainees stay with the Informals until fully qualified.

The Informals offers a robust support network, including social events, mental wellbeing resources, exam reminders, and more. The volunteer-driven Informals Committee, spread across the UK, organises social, educational, wellbeing, and sporting events. Since Autumn 2014, it has been an official CIPA committee, reporting to the CIPA Council and the Internal Governance Committee.

The Committee also advises on training and support needs and meets twice yearly with the PEB Governance Board to discuss examination issues. Feedback on exams is always welcome.



5. Introduction from the Honorary Secretary



Hello! My name is Ashley and I'm the 2024 Honorary Secretary of the Informals Committee. My general role is to oversee the committee and ensure everything runs smoothly.

Who are the CIPA Informals?

The Informals is a loose association of the members of the Chartered Institute of Patent Attorneys (CIPA) who are not yet fully-qualified. This mainly consists of trainee patent attorneys who are new to the profession, part-qualified, or single-qualified in the UK or Europe. However, opportunities provided by the Informals' Committee may be of interest to those who are recently dual-qualified (e.g. those who are one or two years post-qualification). Thus, the remit of the Informals' Committee may extend to associate members of CIPA who are part-qualified, and to CIPA Fellows who are single or recently dual-qualified patent attorneys.

What is the role of the Honorary Secretary?

The Informals Committee aims to act as the collective voice of trainees within the profession. As Informals Honorary Secretary, my duty is to oversee the Committee and attend CIPA Council meetings in order to present the views and concerns of the younger members of the profession to CIPA. Additional responsibilities include:

- Liaising with CIPA membership team to organise committee meetings, provide an agenda, request minutes of meetings
- Promoting a diverse range of training topics for the advanced lecture series, including business development, managing relations, and networking
- Reporting on the activities the Committee undertakes and on financial matters to CIPA Council and/or the Internal Governance Committee of CIPA

Anything else?

I strongly recommend signing up to the yellowsheet blog where we post regular committee updates and events. This may include tutorials, sports socials, conferences, yoga sessions, and more!"



6. Educational events

Lectures

CIPA and the Informals Committee collaborate to run lectures and tutorials to support in both the UK Patent Examination Board (PEB) exams and the European Qualifying Examination (EQE). Details on the exams themselves can be found in the sections regarding the UK and European qualifications.

Each lecture focuses on a specific topic, both of relevance for the exams, but also to day-to-day practise for trainees.

Both the Foundation exams and Final exams have a series of lectures to support them, running from January to the summertime each year.

The Foundation lecture series includes individual lectures with titles like 'Novelty and Inventive Step', 'Patentability', 'Basic English Law', 'Introduction to Trade Marks', 'Introduction to Copyright and Designs', 'Infringement', etc. The lectures are designed to introduce trainees to some of the key topics which are useful in day-to-day work and which form part of the Foundation exams.

All lectures are broadcast live on Zoom, recordings are then logged in the Lecture Archive section of the CIPA website.

Tutorials

CIPA and the Informals Committee work together to provide a tutorial system each year, to help trainees to prepare for the UK and European exams. Qualified Chartered Patent Attorneys ('Fellows') offer tutorials to go over specific past exam papers (for the UK exams and the EQE), and trainees can sign up to join the tutorials. This is especially useful if you're at a small firm or in an in-house IP department, or if you're the only one in your office taking a particular exam. Even if you're at a big firm that runs its own tutorials, you can always benefit from the experience and expertise of attorneys working at other firms or in industry. Plus, the tutorials are free and open to everybody. Although there is no requirement that you must organise a tutorial to be able to participate in one, we do

6. Educational events



encourage you to organise a tutorial for other people to take part in too, if possible. Your tutorial could be led by your supervisor or another qualified colleague, for example. Further information about the tutorial system, and a list of available tutorials, is available at yellowsheet.wordpress.com/tutorials.

Buddy Scheme

Educational events Calendar



January	UK Foundation lectures		EQE tutorials
February			EQEs
March			
April			
May			
June			
July			UK tutorials (Foundation and Final)
August			
September			
October	UK exams		
November			EQE tutorials
December			

6. Educational events

The Informals Committee also organises a buddy scheme, which provides useful support channels for trainees. This is particularly useful for those in small firms or working in-house. Upon signing up, you will be paired with another trainee that has signed up to the scheme. More information can be found at yellowsheet.wordpress.com/buddy-scheme.

UK IPO visits

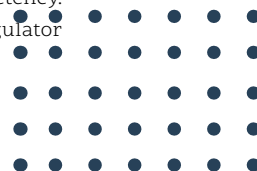
The Committee organises annual trips to the UK Intellectual Property Office ('IPO') which gives trainees the opportunity to meet with the patent examiners, see the inside workings of the IPO and attend lectures from senior examiners on subject matter like 'Excluded subject matter' and 'Accelerated processing'. There are further one-on-one discussions with the examiners and a claim drafting workshop. Please note that these often get booked very quickly. The visits are arranged between May and June and an email will go out to all Student members announcing the booking opening as well as a post on the Yellowsheet blog.

CIPA Education Committee

CIPA has an Education Committee that reports to Council. The purpose of the Education Committee is to advise Council on all matters relating to internal or external education, training and professional standards initiatives relating to the Institute's reputation and standing. We encourage the engagement of all CIPA members on issues relating to these matters.

Our committee members come from across the profession and include paralegal members and student members.

The remit of the committee is wide ranging, and we cover all aspects of training, education, professional standards and professional competency. We liaise with the Patent Examination Board, and also with our regulator



6. Educational events

IPReg and the Legal Service Board, as well as academic institutions involved in IP training and education, the EPO and the European Patent Institute.

We also work with other CIPA committees in relation to training and education.

We have a number of working groups looking at specific aspects of our work such as trainer training, and our professional development programme of webinars and seminars for ongoing professional competence. From time to time, we put in place additional working groups if needs arise.

The Committee meets every quarter, with members of individual working groups meeting between the main committee meetings to work on their specific projects.

Members of the Committee are all volunteers and we are supported by the Learning & Development Manager at the CIPA office.

The Education Committee would like to welcome you all to the patent attorney profession. We hope you find your career progression both interesting and fulfilling. We are always open to receiving feedback, suggestions, questions and comments from our student members: either directly or through Informals.

Our best wishes to you all for your future.

Debbie Slater, Chair, Education Committee



7. Social and Sporting Events

Another focus of the Informals Committee is organising social events throughout the year, in London and around the UK. These events provide trainees with an opportunity to socialise with one another and to learn more about the patent profession through each other's experiences. Typically, in London the Committee organises at least a new entrants' and post-UK exams party in autumn, a Christmas party, a post-EQEs party in March or April, and a summer event.

CIPA and the Committee also coordinates sporting events such as the annual five-a-side football tournament.

In the summer, there is an annual Intellectual Property Ball (IP Ball, organised by a separate committee) in London, which is attended by patent and trade mark trainees and attorneys.

Outside London, the Informals Regional Secretaries organise cocktail nights, trips to local pubs, curry nights, Christmas dinners, etc. in a number of regions. Many regional events are at least partially subsidised by the Informals, in the way of a free drink or two, food, or ticket cost, depending on the event. A list of the current regional secretaries is provided on the Yellow Sheet website. If you'd like to see events in your region, please get in touch with the Honorary Secretary. As long as there are at least two IP organisations in your area, and you're willing to volunteer to become the regional secretary in that area, we can probably help you to run events in your area.

The best way to keep up with events is via then events tab on our blog (yellowsheet.wordpress.com/events/) which lists upcoming events that we think will be of interest to trainees, including lectures, CIPA events, IP Inclusive events, and our own Informals social and sporting events. We also share a monthly blog post listing upcoming events, and regularly post on the blog and LinkedIn® group.

One more thing — as a registered CIPA student member, you can request a free Totum Pro card from membership@cipa.org.uk, which provides access to a variety of deals and discounts.



8. How to keep informed about the Informals

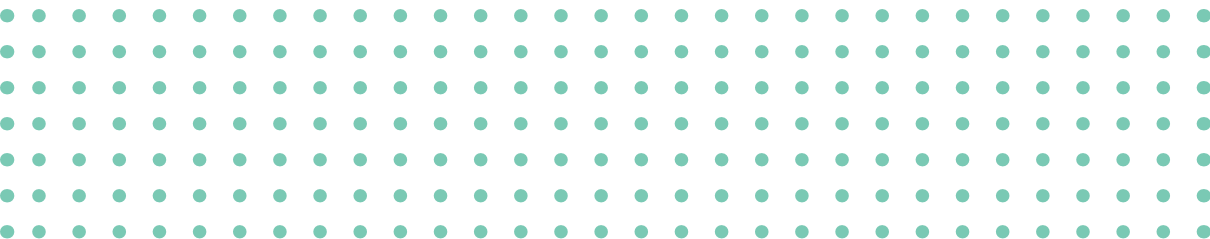
The Informals Committee engages with trainee patent attorneys through various channels:

1. Yellow Sheet Blog. Managed by the Yellow Sheet Blog Editor, this blog (yellowsheet.wordpress.com) is regularly updated with essential information about lectures, event changes, exam deadlines, social events, and qualification updates. Trainees are encouraged to subscribe to stay informed.
2. LinkedIn Group. Join our LinkedIn group for updates on lectures and social events, www.linkedin.com/groups/8985205.
3. Yellow Sheet Newsletter. Compiled by a separate Yellow Sheet Editor, this section in the monthly CIPA journal features event updates, the entertaining ‘wacky patent’ feature, and educational content. Since the journal is monthly, subscribing to the blog and joining the LinkedIn group is the best way to stay current.

For questions, you can contact individual Committee members via email, which can be found on the Yellow Sheet website, yellowsheet.wordpress.com.

If you'd like to contribute to the blog or newsletter, or share a ‘wacky patent,’ email us at informalsyellowsheet@gmail.com.

Additional contact details are available at yellowsheet.wordpress.com/contact-details.



9. Getting Involved

As mentioned earlier, CIPA tirelessly champions its members by bolstering the reputation of the UK patent profession, lobbying on relevant issues, and providing top-notch education and training for both trainees and qualified attorneys. This impressive work is powered by a host of dedicated committees. For instance, the Litigation Committee tackles IP litigation and patent attorney rights in court, the Media and Public Relations Committee handles press and media interactions, and the Education Committee oversees professional education and training.

As student members of CIPA, you're encouraged to join these committees and influence CIPA's direction. There's usually no need for prior experience or qualifications. For example, the Informals Education Coordinator and Honorary Secretary attend Education Committee meetings to stay updated on education reforms and represent student views. Discover more about the committees on the CIPA website. If you're eager to get involved, just email a current committee member, yellowsheet.wordpress.com/meet-the-team-2023-24.

When you have qualified in the UK, consider joining CIPA Council, which governs CIPA. There's no minimum age or experience requirement to stand for election. It's crucial for junior patent professionals to be represented on the Council. Notably, former Informals Treasurer Alicia Instone became CIPA Council President in 2021. The Informals Committee's Honorary Secretary also holds a Council seat to ensure student voices are heard. Contact any Council member for more information, www.cipa.org.uk/officers-and-council-members.

After qualification, stay connected! The Informals depend on qualified members to lead tutorials, webinars, and lectures. Keep in touch via LinkedIn, the blog, or email us!



10. How do you qualify as a Patent Attorney?

Most trainees in the UK aim to become qualified as both a UK patent attorney and an attorney qualified to represent clients before the European Patent Office 'EPO'. In order to qualify, it is necessary to pass the qualifying examinations set out below.

Once a trainee has passed the UK examinations, they must apply to the Intellectual Property Regulation Board 'IPReg' to be entered on the register maintained by IPReg. Once on the register, the trainee is a registered patent attorney 'RPA'.

Once a trainee has passed the European Qualifying Examination 'EQE', they must apply to the EPO to be entered on the list maintained by the EPO. Once on that list, the trainee is a 'professional representative before the European Patent Office' but is usually referred to as a European patent attorney 'EPA'. They also automatically become a member of the Institute of Professional Representatives before the EPO which is usually referred to as *epi*. Anyone who is an EPA can apply to become an EPA member of CIPA.

Anyone who is an RPA can apply to become a Fellow of CIPA. This usually involves applying to change their category of CIPA membership from Student to Fellow. Once they have become Fellows, RPAs can, according to CIPA's Royal Charter of 1891, use the restricted title of Chartered Patent Attorney 'CPA'. Most RPAs are also CPAs.

There are differences in how the UK and European qualifications are obtained and in what they allow you to do. The table below sets out the different requirements for qualification and the differences between the two jurisdictions.



	EPA	RPA/CPA	
Qualification essential to represent clients?	Yes for practice before the EPO	No for practice before the UKIPO	
Exam-based qualification?	Yes – must pass the EQE	Yes – must pass the PEB's Final Diploma examinations	
Practice requirement?	At least three years because a trainee must have completed service in the profession of at least: One year for taking Foundation paper F; Two years for taking the main examination papers M1 and M2; and Three years for taking the main examination papers M3 and M4	At least two years - see below	
Essential to train with a qualified attorney?	Yes – in order to enrol for the EQE exams, an EPA must sign a form indicating you have been trained by them (Article 134(1) EPC) It is possible for in-house employees who are not trained by an EPA to enter for the examinations under certain circumstances (see Section G.II below)	No – but, if you train under the supervision of an RPA, you only need to have been in the profession for two years to be able to be registered as an RPA whereas, if you do not train under an RPA, you need to be able to show you have at least four years of relevant practice before you can be registered	

		EPA	RPA/CPA
	STEM degree	Yes – see European Qualification section G.I below for details	Yes* - The PEB have stated that a STEM degree is required. *If a candidate does not hold a STEM degree they may apply to the PEB to have alternative qualifications or experience considered. www.cipa.org.uk/patent-examination-board/policies/examination-policies
	Resident / National of member state	No, you do not have to be a citizen of one of the EPC member states to register for the EQE and take the exams. However, in order to be included in the list of professional representatives, you must be resident in an EPC member state (see article 134 EPC). (www.epo.org/en/legal/epc/2020/a134.html)	No
	Continuing Professional Development (CPD)	No statutory requirement but the <i>epi</i> code of conduct requires <i>epi</i> members to be competent to represent your clients which does require you to keep up-to-date.	Yes – IPReg requires that RPAs shall undertake appropriate continuing professional development and, on request, provide details thereof to the appropriate Regulation Board. Rule 16 of IPReg Code of Conduct).

11. UK Qualification System

The Intellectual Property Regulation Board 'IPReg', see 'Other Bodies', section H.II below, is responsible for setting the education and training requirements for qualification as a patent attorney in the UK. The requirements set by IPReg can be found here:

- ipreg.org.uk/what-is-an-attorney/becoming-an-attorney
- ipreg.org.uk/pro/getting-qualified

There are four key components to become qualified as a Registered Patent Attorney:

1. Foundation level examinations (Foundation Certificate; FC)
2. Final level examinations (Final Diploma; FD)
3. Practice requirement
4. Advocacy examination

These components are explained in more detail below.

I. Foundation Level

IPReg has approved several examination agencies at Foundation level. These include:

- Queen Mary, University of London
The Postgraduate Certificate in Intellectual Property Law course is a thirteen-week, full-time course in London, which starts in September and finishes in mid-December. The exams run over two weeks in January. The course concentrates on '*many of the practical aspects of patents, trade marks and designs, and features greater involvement of patent and trade mark practitioners to complement the academic treatment of the subject matter*' [source: QM-UL website].
www.qmul.ac.uk/postgraduate/taught/coursefinder/courses/intellectual-property-law-ip-reg-pgcert



11. UK Qualification System

- Bournemouth University

The *Intellectual Property Postgraduate Certificate* course is a hybrid online and in-person course. The course starts in January each year and ends in June, with a final three-hour examination. Approximately 60 hours of the course (over three weekends) are delivered by academics and practising experts in IP. To reinforce and develop your knowledge you will have to undertake approximately 12 hours per week of self-directed study (reading set texts and web resources, researching, participating in online tutor group activities etc.) using the Virtual Learning Environment and electronic resources. Attendance is required on three weekends supported by distance learning between weekends and one exam attendance [source: Bournemouth University website].
www.bournemouth.ac.uk/study/courses/pg-cert-intellectual-property

- Brunel University

The *Intellectual Property Law PGCert* course is a part-time programme which starts in September and continues until March. It is delivered on Wednesdays from 1pm to 5pm. The course '*will explain the basic principles of intellectual property law and the nature and scope of these rights. It will also explore the procedures, both national and supranational, for the granting and recognition of the rights, and mechanisms for enforcement as well as defences against enforcement*' [source: Brunel University website].
www.brunel.ac.uk/study/courses/intellectual-property-law-postgraduate-certificate



11. UK Qualification System

- The Patent Examination Board (PEB)

The PEB examinations are held once every year, usually in October. The PEB does not run any courses – trainees prepare for the exams in their own time, and/or by going on external courses. Please note, as of 2015 the names of the examinations have changed, but your supervisors will likely refer to the exams by the old names, so we have included both names in the list below. The PEB Foundation Certificate exams are:

- a. Basic UK Patent Law and Procedure (former P1, now called FC1)
- b. Basic English Law (former 'Law' paper, now called FC2)
- c. Basic Overseas Patent Law and Procedure (former P5, now called FC3)
- d. Design and Copyright (former 'D&C' paper, now called FC4)
- e. Principles of Trade Mark Law (former P7, now called FC5)

www.cipa.org.uk/patent-examination-board

www.cipa.org.uk/patent-examination-board/support/past-examination-materials

Please also note that the syllabi are updated each year, so the link above may not be the most recent one.

II. Finals Level

IPReg has approved only the Patent Examination Board as the examination agency providing Final level examinations. Please note, the names of the examinations changed in 2015, but your supervisors may refer to the exams by the old names, so we have included both names in the list below. The PEB Final Diploma exams are:

- a. Advanced IP Law and Practice (former P2, now called FD1)
- b. Drafting of Specifications (former P3, now called FD2)
- c. Amendment of Specifications (former P4, now called FD3)
- d. Infringement and Validity (former P6, now called FD4)

It is currently possible to be considered as having passed FD2 and FD3 by passing the equivalent EQE papers (Papers A & B) or the EQE as a whole.

11. UK Qualification System

See here for more information:

www.cipa.org.uk/patent-examination-board/faq

www.cipa.org.uk/patent-examination-board/support/past-examination-materials/past-examination-materials-qualifying-examinations/2021-examinations

Please also note that the syllabi are updated each year, so the link above may not be the most recent one.

III. Practice Requirement

In order to be entered onto the Register of Patent Attorneys, you are required to have spent two years in full-time practice in IP under the supervision of a:

- Registered Patent Attorney

or

- Barrister/solicitor/advocate who is engaged in, or has substantial experience of, patent attorney work in the UK

Otherwise, you need to have four years' full-time practice in IP, including substantial experience of patent attorney work in the UK.

There is currently no specific requirement regarding the nature of practice to be undertaken. However, there is guidance on the knowledge and experience recommended before sitting the Final papers on the PEB website. For example, it is recommended that before you take FD2 (the drafting exam), you should have worked on ten UK drafts during your day-to-day work, and attempted at least five past papers.



IV. Litigation and Advocacy

There are three levels of litigation qualification. The first level is an Intellectual Property Litigation Certificate, which provides you with:

- the basic right to conduct appeals in the High Court from decisions of the UK Intellectual Property Office;
- the opportunity to seek judicial review of such decisions in the High Court; and
- the right to be heard in the Intellectual Property Enterprise Court ('IPEC').

All attorneys attend and pass a Basic Litigation Skills Course within three years of qualification. More information about this requirement can be found on the IPReg website, ipreg.org.uk/pro/ipregs-regulatory-arrangements/litigation-and-rights-of-audience-rules ipreg.org.uk/pro/cpd/intellectual-property-basic-litigation-certificate

IPReg has accredited three providers of a Basic Litigation Skills course.

- Nottingham Law School

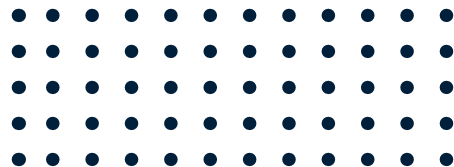
The Basic Litigation Skills course to be offered by Nottingham Law School is a five-day course for patent attorneys (generally Monday to Friday). The course is accredited by IPReg and will be assessed by a two-hour written paper and a 15-minute advocacy assessment between four and six weeks following the course. Success in the assessment entitles candidates to apply to IPReg for the *Intellectual Property Litigation Certificate*.

www.ntu.ac.uk/course/nottingham-law-school/pr/certificate-in-intellectual-property-basic-litigation-skills-patent-attorney

- CPD Training (UK) Ltd

Several public CPD Training (UK) courses are typically scheduled to run in at various times across the year.

www.cpdtraining.net/bookings



12. European Qualification System

There are five key requirements to becoming qualified as a European Patent Attorney (EPA):

- i. A STEM degree — wherein at least 80% of the degree was STEM;
- ii. Professional activity;
- iii. Registration of your professional activity;
- iv. Enrolling in and passing the European qualifying examination (EQE); and
- v. Residency and nationality.

Before considering these five requirements in detail, it is important to note that the EQE will be in transition until March 2027. The new EQE, which contains foundation paper F and main examination papers M1 to M4, will gradually roll out from March 2025 and the last opportunity to sit the main examination papers A to D of the old EQE will be in March 2026. There are transitional provisions for candidates who have already taken, but not fully passed, the old EQE.

- The new EQE is detailed in the Regulation on the European qualifying examination (REE) and Implementing provisions to the REE (IPREE) which apply from 1 January 2025, link.epo.org/elearning/SupplPub2025
- The previous EQE is detailed in the REE and IPREE which applied from 1 January 2009 and were republished in 2019, www.epo.org/xx/legal/official-journal/2019/etc/se2/2019-se2.pdf
- There is a useful article explaining the transition in detail here: patentepi.org/en/epi-students/qualifying-as-a-european-patent-attorney

I. STEM Degree Requirement

The STEM degree requirement has not changed with the implementation of the new EQE. Thus, any decisions regarding admission to the EQE continue to be based on the conditions laid down in Article 11(1)(a) REE and Rules 11 to 14 IPREE.

The IPREE states that a candidate can be registered to take the EQE *‘provided they possess at least a university-level scientific or technical bachelor’s degree, or any equivalent academic degree’ (Rule 11)* in any one



of 'biology, biochemistry, chemistry, construction technology, electricity, electronics, information technology, mathematics, mechanics, medicine, pharmacology and physics' (Rule 13). Importantly, Rule 11(2) states that 'the academic degree...shall have been awarded at the end of a full-time course with a minimum duration of three years. At least 80% of the course hours taken to obtain this degree shall have been devoted to scientific and/or technical subjects'. Thus, if your degree is in a subject like Geology, Geophysics, Physics & Music, or Mathematics & Philosophy, you will need to prove that you spent at least 80% of your time studying the technical/scientific parts. Otherwise, you will need at least ten years' experience of professional activity before being eligible to sit the EQE.

II. Professional Activity Requirement

In addition to the STEM degree requirement, there is a professional activity requirement which must be completed before you sit the EQE. There are three different routes to fulfilling this requirement which are similar to the practice requirement for the UK examinations:

- a. training under the supervision of a qualified European Patent Attorney;
- b. representing your employer before the EPO; or
- c. working as an EPO examiner.

More details of the requirements of each route are set out below but it is noted that the first route is the most common route.

For the old EQE, you must have completed at least three years of professional experience by the date of sitting papers A to D. In other words, you will need to have started a full-time period of eligible professional activity before March 2023 to be eligible to sit the final set of papers A to D in 2026.

The professional experience requirements are different in the new EQE because the examinations can be taken in a modular fashion over three years. Going forwards, Article 11(2)(a) states that at the time of sitting

the examination, candidates must have performed one or more of the professional activities for a duration of:

- *at least one year for taking the foundation paper F,*
- *at least two years for taking the main examination papers M1 and M2,*
and
- *at least three years for taking the main examination papers M3 and M4*

It is also possible to take all the main examination papers together after three years without taking the foundation paper but, if the candidate does not pass all four papers, they will be required to take the foundation paper.

Please note that each of these periods of professional activity must be completed in one or more of the contracting states of the EPC and only professional activities amounting to a minimum period of three months with at least 50% part-time involvement can be counted (Rule 15). Furthermore, if you are not working full-time, the durations listed above will be increased.

II.i. Training under an EPA (Private Practice or In-House)

Article 11(2)(b)(i) REE specifies that a candidate must have *'completed a full-time training in one of the EPC contracting states under the supervision of one or more persons entered on the list of professional representatives before the EPO, as an assistant to that person or those persons, including taking part in a wide range of activities pertaining to European patent applications or European patents'*.

Your supervisor will be required to complete a certificate to confirm that you are training under their supervision.

II.ii. Representing Your Employer (In-House)

Article 11(2)(b)(ii) REE recognizes the professional activity of candidates who are doing *'the EPC contracting states, including representing that employer before the EPO in accordance with Article 133(3) EPC and taking*



12. European Qualification System

part in a wide range of activities pertaining to European patent applications or European patents'. Please note that this type of professional activity only applies to in-house/industry trainees who are not training under an EPA.

Your employer will also be required to complete a certificate to confirm that you are working for them and this certificate must also be accompanied by a general authorization signed by your employer and a list of European Patent Applications or patents for which you have represented your employer before the EPO. Please note that the period of professional activity will not begin until you have used the general authorization to file something in your own name on behalf of your employer at the EPO.

General authorisation. Editable EPO form 1004,
pctlegal.wipo.int/eGuide/forms/ax_V_ep.pdf

II.iii. Working as an EPO Examiner

Article 11(2)(b)(iii) lists a third type of professional activity which is '*full-time work as an examiner at the EPO*'.

Article 14(2) REE further specifies that candidates who rely on this type of professional activity to sit the examinations will not be deemed to have passed the examination until '*they have spent at least one year in any of the capacities defined in Article 112(b)(i) or (ii)*'. In other words, Examiners are required to gain a further year of experience either under the supervision of a qualified EPA or whilst representing an employer with a general authorisation.

III. Registration of Professional Experience

Rule 28 IPREE specifies that candidates '*intending to enrol for the EQE for the first time must register once they have started a professional activity within the meaning of Article 11(2) REE*'. Please note that registration is a separate step from enrolling for any examination paper. Each year, the Examination Secretariat specifies two separate deadlines:

12. European Qualification System

1. the registration deadline, which is the deadline by which candidates who wish to enrol in an examination paper for the first time must be registered; and
2. the enrolment deadline for enrolling in one or more examinations, assuming that you are already registered.

The registration deadline is much earlier than the enrolment deadline, for example the registration date for the March 2025 foundation paper F is 28 May 2024 and the enrolment deadline is 23 September 2024. The Informals post regular reminders about these deadlines on the The Yellow Sheet, The Official Blog of the Informals Committee, yellowsheet.wordpress.com but it is recommended that candidates register shortly after starting work.

Registration is done via the EQE portal and requires payment of the appropriate fee and submission of various documents, including:

- a certified copy of a valid ID or passport
- a certified copy of academic qualifications
- a certificate of training or employment, [TrainingForm_EN.pdf \(epo.org\)](https://www.epo.org/epi-students/qualifying-as-a-european-patent-attorney)
- additional documents if not training under the supervision of an EPA

IV. Enrolling for and Passing the Examination Papers

Enrolment for the examination papers is done through the same portal as registration. The enrolment window is normally open between July and September of the year preceding the examination. Enrolment requires payment of the appropriate fee(s). Please make sure that this is paid before the enrolment window closes otherwise you will have to wait another year to sit the examination.

Whilst the EQE is in transition, some candidates will be able to choose whether to sit the new or the old EQE. There is a useful article explaining the different routes in detail here, patentepi.org/en/epi-students/qualifying-as-a-european-patent-attorney. Please note that, once you sit one of the new examination papers, you will no longer be able to sit any of the old examination papers.

There are five papers in the old EQE:

- a. Pre-examination
- b. Paper A – Drafting Claims & Introduction for an EP application
- c. Paper B – Preparing a Response to an Examination Report
- d. Paper C – Notice of Opposition
- e. Paper D – Legal Questions

The content of each main examination paper is defined in Rules 23 to 26 of the previous version of the IPREE. More information, including past papers with mark schemes, can be found on the EPO website at

www.epo.org/en/learning/eqe-epac/european-qualifying-examination-eqe

The last pre-examination was held in 2024 and papers A to D will be offered in 2025 and 2026 only. Candidates who would have been eligible to sit the pre-examination in 2025 will be exempt and can enrol for the main examination papers in 2026 if they meet the professional activity requirement. Candidates who wish to enrol in any of Papers A to D in 2025 will need to have passed the pre-examination and completed a three-year period of professional activity by March 2025.

For the new examination, there are also five papers:

- a. Foundation Paper F
- b. Main Examination Paper M1
- c. Main Examination Paper M2
- d. Main Examination Paper M3
- e. Main Examination Paper M4

Each of these papers is defined in Article 1 of the new REE as set out below.

- a. Paper F assesses whether a candidate can apply legal concepts and provisions of the EPC and the PCT.
- b. Paper M1 assesses whether the candidate can carry out tasks relating to the analysis and assessment of information and evaluate and act on instructions from a client. It further assesses whether the candidate can understand an invention and/or data provided by the client, assess the

12. European Qualification System

invention in view of prior art and analyse whether the invention and the application or patent comply with the provisions of the EPC.

- c. Paper M2 assesses whether the candidate can apply procedural and substantive patent law of the EPC and the PCT in both day-to-day and exceptional situations arising in the practice of professional representatives in proceedings before the EPO. It further assesses whether the candidate is familiar with all procedures established by the EPC and the PCT and with the procedural law referred to as forming part of the examination syllabus.
- d. Paper M3 assesses whether the candidate can assess, draft and develop patent documentation and submissions, based on documents and instructions from the client. It consists of three parts, each requiring a free-text answer:
 - i. Part 1 of paper M3 requires at least the drafting of claims
 - ii. Part 2 of paper M3 requires the candidate to develop and present arguments showing why the invention and the application or patent comply with the requirements of the EPC or the PCT, and to amend claims if necessary.
 - iii. Part 3 of paper M3 requires the candidate to develop and present arguments showing why the invention and the application or patent do not comply with the requirements of the EPC or the PCT.
- e. Paper M4 assesses whether the candidate can provide an answer in the form of a legal opinion responding to an enquiry from a client. The candidate is expected to reason, present and manage advanced procedural and substantive aspects of patent law.

A slightly longer definition is also found in Rules 23 to 26 of the new IPREE and more information will be available on the EPO website.

Paper F, like the pre-examination, is auto-scored and thus it is expected that results will issue within a few weeks of sitting the examination. Papers A to D are free-text answers which are marked by two examiners and thus results are typically issued three months or so after the examination. A similar time frame for obtaining results is expected for papers M1 to M4.

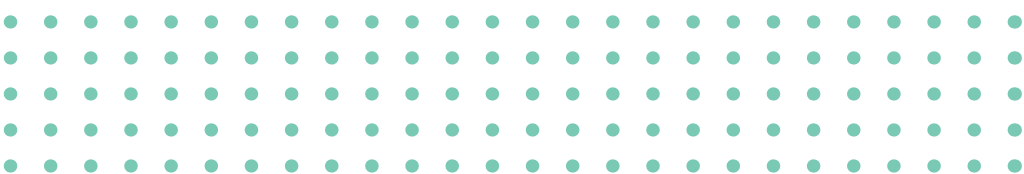
In the old system, there was a fixed pass mark of 50 and a compensation system to allow candidates with between 45 and 49 in one or more papers to pass the EQE as a whole as long as they have a total of 200 marks in the four papers. In the new system, the fixed pass mark has been removed and it is necessary to obtain a pass mark for each paper (and each part of M3) to pass the EQE as a whole.

V. Residency and Nationality Requirement

Article 134(2) EPC states that a person who has passed the EQE can be entered on the list of European patent attorneys only if that person (a) is a national of an EPC-contracting state (e.g. the UK), and (b) has their place of business or employment in an EPC-contracting state. That is, they must be both a national of and a resident in an EPC-contracting state.

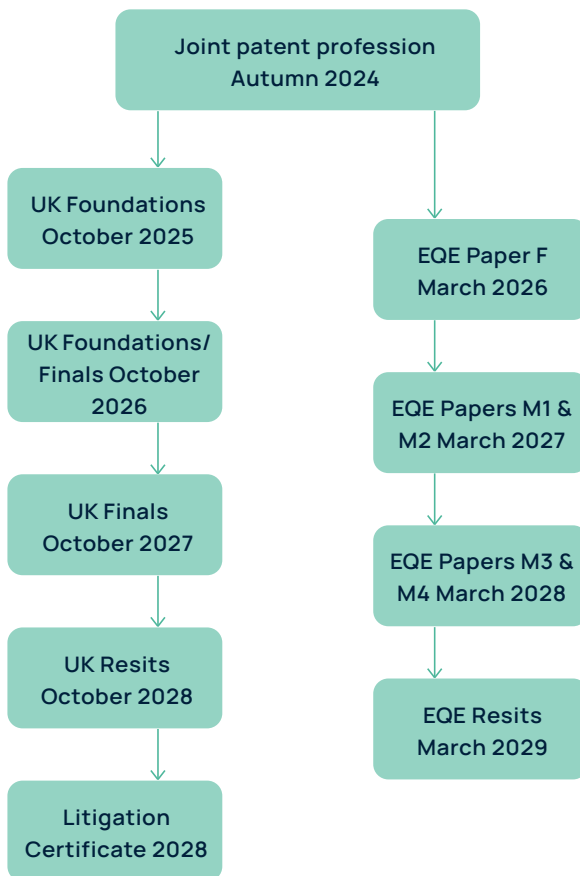
Although this is a requirement to be entered on the list, the nationality requirement is not a requirement to be able to sit the EQE. Thus, for example, you could sit the exams as a non-EPC member state national, but you must normally have EPC member state nationality after qualification if you want to be added to the register of EPAs.

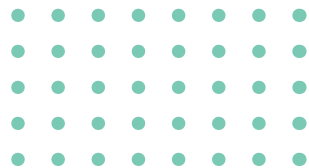
Article 134(7) EPC does allow the President of the European Patent Office to grant exemptions from the nationality requirement in special circumstances. Such an exemption might be granted if a person has lived in an EPC-contracting state for a considerable period of time, is employed as a patent attorney in that state and has demonstrated an intention to stay there permanently and practise as a European patent attorney there. This is more common than you'd perhaps initially think.



VI. Exemplary Timeline for a Trainee Starting in the Profession in Autumn 2024

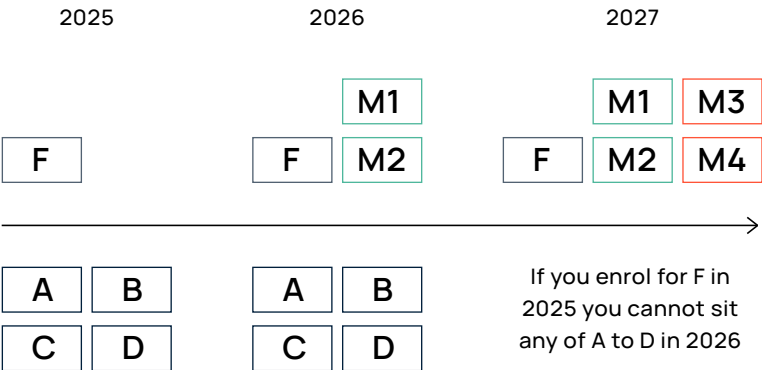
The diagrams below may help you to visualise the various steps in the path to becoming dual-qualified (UK-CPA/RPA & EPA).





VII. Transitional Provisions

The rollout of the new EQE and the wind down of the old EQE is shown below.



12. European Qualification System

It is recognized that not all trainees who take the old EQE will be fully qualified by 2026 and there are transitional provisions to credit candidates for their existing successes as shown in the table below:

New Modules	Exempt if passed
Foundation	Pre-exam OR Any of A to D without passing pre-exam
M1	Pre-exam OR Any of A to C without passing pre-exam
M2	D
M3 part (1)	A
M3 part (2)	B
M3 part (3)	C
M4	D

It is important to note that, although a new candidate must pass all parts of M3, partially qualified candidates only need to sit the parts of M3 covering the skills in which they have not yet been successful. Please also note that to qualify for the exemption, you need to have a score of at least 50.



13. Useful resources and training material

We provide below a list of resources that you may find useful throughout your training, whether you are completely new to the profession or are preparing to sit final exams. This information is also available on the “useful links” page of the Yellow Sheet blog, yellowsheet.wordpress.com/useful-links

If you come across a book, website or course which you find useful that is not included on this list, please let us know and we'll consider adding it to this booklet when it is next updated.

Topics in this section fall under the following headings:

- I. General Resources
- II. Other bodies
- III. Resources for UK Exam Preparation and Day-to-Day UK work
- IV. Resources for EQE Preparation and Day-to-Day EP work
- V. Resources for Design and Copyright Law
- VI. Resources for PCT International Law and Foreign Jurisdictions
- VII. Resources for Equality, Diversity and Inclusion

I. General Resources

- CIPA Journal — Once you are a student member of CIPA, you will be sent a copy of the CIPA Journal each month. It contains reports on recent court cases, information on changes in patent law across the world, and CIPA news. See www.cipa.org.uk/journal.
- Yellow Sheet newsletter and blog — The Informals Committee's newsletter is distributed with the CIPA Journal each month. In between paper newsletters, the blog is used to provide further updates. The newsletter and blog provide details of forthcoming lectures, tutorials, social and sports events, and any other information particularly relevant to trainees. See yellowsheet.wordpress.com.



- The CIPA website — An invaluable source of information. Includes details of upcoming seminars and social events, recent changes to patent law and much more. See www.cipa.org.uk.
- The EPO website – Another invaluable source. Includes official EPO notices and Appeal Board decisions, as well as details of the European patent system and the European Patent Convention (EPC) itself. You'll become intimately familiar with the Guidelines for Examination, which can also be found on this website. See www.epo.org/en.
- The Official Journal of the EPO — A source of official information and general notices from the EPO, and of other information relevant to the EPC or its implementation. See www.epo.org/en/legal/official-journal.

II. Other Bodies

Intellectual Property Regulation Board (IPReg)

The Intellectual Property Regulation Board (IPReg) was set up by the Chartered Institute of Patent Attorneys (CIPA) and the Institute of Trade Mark Attorneys (ITMA) to undertake the regulation of the patent attorney and trade mark attorney professions, after changes to the Legal Services Act necessitated an independent regulatory body.

IPReg is responsible for setting the education and training requirements for qualification as a patent attorney and a trade mark attorney, setting the requirements for continuous professional development (CPD), setting and maintaining the Code of Conduct for the professions and handling complaints of professional misconduct against patent and trade mark attorneys (and where appropriate taking disciplinary or other action). See ipreg.org.uk.

Chartered Institute of Trade Mark Attorneys (CITMA)

CITMA is the professional body for trade mark attorneys in the United Kingdom. “The Chartered Institute of Trade Mark Attorneys, which was founded in 1934 and chartered in 2016, promotes high standards of training, qualification and continued learning in order to ensure that the

13. Useful resources and training material

Trade Mark Attorney profession is able to undertake on behalf of clients, large and small, all of the work associated with securing and protecting trademarks and other intellectual property rights, for example registered designs, both in the UK and abroad”

[Source: CITMA website] www.citma.org.uk.

Patent Examination Board (PEB)

The Patent Examination Board (PEB) is an independent committee of CIPA and is responsible for setting and marking the UK qualifying examination papers (Foundation and Final examinations), for revising the syllabi, and for setting and marking the Litigation Skills Course exams which lead to the Basic Litigation Certificate. PEB runs UK qualifying examinations every year, generally in October.

Professional qualifications for UK patent attorneys comprise nine examinations; five at Foundation level and four at Final level. Currently, in order to become a Registered Patent Attorney (RPA) you must: (a) pass or be exempted from the Foundation level examinations, (b) pass the Final level examinations, and (c) satisfy any service requirements which have been set by The Intellectual Property Regulation Board (IPReg). More information about the examinations, as well as FAQs and past examination papers, can be found on the PEB website www.cipa.org.uk/patent-examination-board.

The Institute of Professional Representatives before the European Patent Office (*epi*)

The Institute of Professional Representatives before the European Patent Office (also known as the European Patent Institute or *epi*) is a professional association of European patent attorneys and an international non-governmental public law corporation. It was founded on October 21, 1977 by the Administrative Council of the European Patent Organisation. All European Patent Attorneys, i.e. all persons entitled to act as professional representatives before the EPO (by virtue of passing the European qualifying examination (EQE)), are members of the Institute.

13. Useful resources and training material

Trainees preparing for the European qualifying examination (EQE) may become *epi* student members (see the website for more information patentepi.org/en)

Currently, each student is entitled to receive their own copy of “European qualifying examination — Guide for preparation”, receive an issue of the quarterly magazine “*epi* Information”, and a 50% reduction on course fees of *epi* educational events, such as tutorials, mock EQE papers and seminars.

IP Inclusive

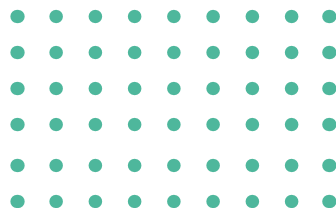
IP Inclusive is a collection of individuals and organisations in the intellectual property (IP) sector, who have come together to make our community more inclusive, diverse, open and fair. See their Our Mission Statement — IP Inclusive.

The initiative is run by the sector, for the sector on a voluntary basis. It brings together IP professionals of all types, at all levels of seniority, from all kinds of working environments and in all parts of the UK. Meet the current team to get involved or find out how you can help.

Mostly, they work by sharing best practices, providing training, running events and providing resources to help people promote diversity and inclusion — including through their Careers in Ideas outreach campaign for young people who may be interested in a career in IP. The events and resources are free at the point of delivery; there's no paywall. But they do ask all their supporters to give what they can to keep the initiative going: if you can contribute, please visit the fundraising page.

They also provide safe spaces where everybody can feel involved and valued. In particular they have (currently) six communities supporting diverse groups in the IP sector:

- BAME professionals (IP & ME)
- Disabled professionals and carers (IP Ability)
- Early-career professionals (IP Futures)



- Solo parents and other non-traditional family members (IP Non-traditional Family Network)
- LGBT+ professionals (IP Out)
- Women (Women in IP)

All six are open to allies and partner organisations as well, ipinclusive.org.uk

III. Resources for UK Exam Preparation and Day-to-Day UK Work

Legal Texts

- The Patents Act 1977
This sets out the requirements for patent applications, how the patent granting process should operate, and the law relating to disputes concerning patents. It also sets out how UK law relates to the European Patent Convention (EPC) and the Patent Cooperation Treaty (PCT).
www.gov.uk/government/publications/the-patents-act-1977
- The Patents Rules 2007
These set out the detailed procedures to implement the Patents Act 1977.
gov.uk/government/publications/the-patents-rules-2007-and-patents-fees-rules-2007

Useful material in your first year, and preparing for Foundations

- The PEB website — Valuable information pertaining to exams run by the Patent Examination Board. Includes all notices released by the PEB, exam regulations, past exam papers, exam syllabi, exam results, and contact information. www.cipa.org.uk/patent-examination-board
 - The CIPA Training Manuals — CIPA produces a Patents Training Manual, a Foundation Level Training Manual on Trade Mark Law, and a Designs and Copyright Training Manual. Further details can be found at www.cipa.org.uk/shop
- 

13. Useful resources and training material

- Informals Foundation lectures — every year the Informals Foundation Lecture Organiser arranges a series of lectures that address various topics relevant to a new patent attorney trainee.
www.cipa.org.uk/lecture-archive
- The Manual of Patent Practice (MoPP) — this explains how the UK Patent Office puts the Patents Act 1977 into practice. The Manual is updated regularly to reflect recent developments in law. Note, the MoPP is not a set of legal requirements.
www.gov.uk/government/publications/patents-manual-of-patent-practice
- The JDD Consultants run revision courses to help prepare for all UK papers. See more at jddcourses.co.uk

Useful material when preparing for Finals

- Drafting Manuals — CIPA contributes to and/or publishes a number of textbooks and manuals, including Fundamentals of Patent Drafting by Paul Cole. Further details can be found at www.cipa.org.uk/shop
- CIPA publications for the Final papers — *Study Guide to the Patents Acts* (Doug Ealey), *Infringement and Validity: CIPA FD4 Study Guide* (Nigel Frankland), *Amendment of Specifications: CIPA FD3 Study Guide* (Tim Allsop), and *CIPA Study Guide to FD2: Drafting of Specifications* (Iain Russell). Further details can be found at www.cipa.org.uk/shop
- When you're preparing for the FD1 (previously P2) PEB paper, you might like to join Doug Ealey's P2 (FD1) Study Guide group on LinkedIn® which has information on when the new version of the study guide is released and allows students to discuss past paper questions with each other. Visit www.linkedin.com/groups/4425194 to learn more.
- Loki's Patent Blog, www.lokispatentblog.com
- CIPA lectures on each of the four Finals papers,
 1. FD1 — Advice for FD1 (P2) Candidates and Mentors can be found at www.cipa.org.uk/events/advice-for-fd1-p2-candidates-and-mentors-2
 2. FD2 — Advice for FD2 (P3) Candidates can be found at www.cipa.org.uk/events/fd3_overview

13. Useful resources and training material

3. FD3 — An overview and practical guide to the UK Final Amendment of Specifications Paper can be found at www.cipa.org.uk/events/fd3_overview
 4. FD4 — For Trainees 2021, visit www.cipa.org.uk/events/fd4-for-trainees-2021
- The Manual of Patent Practice (MoPP)
 - The JDD Consultants run revision courses to help prepare for all UK papers JDD Consultants. Visit jddcourses.co.uk to learn more.
 - Barnes IP Training run FD4 courses Intellectual Property Training Courses, www.barnesiptraining.co.uk
 - Informals Tutorials, yellowsheet.wordpress.com/tutorials

Additional resources

- The “Black Book” — A staple for every patent attorney’s desk — your firm probably has the latest copy in the library. This is also known as the *CIPA Guide to the UK Patents Acts*. It contains a section-by-section guide to the Patents Act 1977 and relevant provisions of the Copyright, Designs and Patents Act 1988, provides extensive commentary on the interpretation of each section by the UKIPO and courts, and on relevant case law of the EPO Boards of Appeal, and acts as a practical guide to the current requirements and procedures before the UKIPO and the UK courts.

IV. Resources for EQE Preparation and Day-to-Day EP Work

The Legal Texts

- The European Patent Convention (EPC) — this sets out the requirements for patent applications, how the patent-granting process should operate, and the law relating to oppositions of granted European patents. It comprises the EPC Articles and the Implementing Regulations (Rules). www.epo.org/en/legal/epc
- The Patent Cooperation Treaty (PCT) — this sets out the requirements for international patent applications, and how an application progresses through the various phases of the international phase of an international

13. Useful resources and training material

- patent application through the PCT. It comprises a (mess) of Articles, Rules, and AI's. www.wipo.int/pct/en
- The London Agreement — also known as the Agreement on the Application of Article 65 EPC, this is an optional agreement aimed at reducing the costs relating to the translation of European patents. www.epo.org/en/legal/london-agreement
 - Case law of the EPO Boards of Appeal — these are decisions made by the Boards of Appeal on legal and technical matters. G decisions are made by the Enlarged Board of Appeal and are the most important, in the sense that they determine how to interpret the EPC in the broadest sense of the word and are most influential. T decisions are technical board of appeal matters that often deal with individual cases and their merits. J decisions are legal matters decided by the Board of Appeal. D decisions are appeals before the disciplinary board. www.epo.org/en/legal/case-law



Useful material in year 1-2, and preparing for the pre-exam

- The EPO's EQE website — this provides information on the EQE including notices from the Examination Board, the compendium of past papers, and enrolment dates as well as the enrolment web portal.
www.epo.org/en/learning/eqe-epac/european-qualifying-examination-eqe
- The EQE Coffee Break questions — these are a series of email questions and answers on aspects of European patent law and practice. The questions could form part of your training for the EQE pre-examination. The questions are short and should each only take between 5 and 15 minutes to answer. There are around 50 questions.
www.epo.org/en/learning/learning-resources-profile/eqe-epac-candidates
- The European Patent Academy — Preparing for the EQE pre-examination paper course is an online course that covers all aspects of the EPC. The course includes articles, quizzes and live sessions with tutors.
www.epo.org/en/learning/learning-resources-profile/eqe-epac-candidates
- The Guidelines for Examination — these give instructions on the practice and procedure to be followed in the examination and opposition of European patent applications and patents. Note, the Guidelines do not constitute legal provisions, but are what the Examiner's follow when writing those pesky A94(3) office actions.
www.epo.org/en/legal/guidelines-epc
- An up-to-date copy of an annotated guide to the European Patent Convention (EPC). The books published annually by Derk Visser and Jelle Hoekstra (References to the European Patent Convention, deltapatents.com) are popular among trainees preparing for the pre-examination or main EQEs. They are also useful reference texts for day-to-day prosecution work.
- Delta Patents pre-Exam book provides model solutions to past papers. Pre-Exam Cases and (mock)Exams, deltapatents.com
- CEIPI (Centre d'Études Internationales de la Propriété Intellectuelle) run various courses to prepare students for the pre-exam and main EQEs.
www.ceipi.edu

13. Useful resources and training material

Useful material when preparing for EQEs

- The IPappify team have the EPC.app and PCT.app self-editable commentaries on the EPC and PCT, respectively. Users can edit the already provided commentary with their own notes during revision and order the book printed so it can be taken with you into the EQE exams. For more information, see the book review from former Hon. Sec. Joel David Briscoe, linked below.
yellowsheet.wordpress.com/2021/11/16/study-materials-review-epc-app-and-pct-app-the-self-editable-commented-conventions
- The Salted Patent blog is written by an EPA and tutor in EPC and PCT law. The blog contains information on what to take to the EQEs and provides possible solutions to past papers, saltedpatent.blogspot.com
- The DeltaPatents blog separately covers each of the pre-exam and the four Main exams, including the DeltaPatents team's answers to exam papers before the official answers are released.
eqe-deltapatents.blogspot.com
- The Fillun EQE blog is written by a recently qualified attorney, sharing their tips, templates and tables for the main exams
www.fillun.com/eqe-blog
- An up-to-date copy of an annotated guide to the European Patent Convention (EPC). The book published annually by Derk Visser (www.wolterskluwer.com/en/solutions/kluweriplaw/european-patents) or by Jelle Hoekstra (webshop.deltapatents.com/references_ep) are popular among trainees preparing for the pre-examination or main EQE. They are also useful reference texts for day-to-day prosecution work.
- CEIPI (Centre d'Études Internationales de la Propriété Intellectuelle) runs various courses to prepare students for the pre-exam and main EQEs.
www.ceipi.edu
- The JDD Consultants EQE revision courses, jddcourses.co.uk
- The Queen Mary University EQE training course,
www.qmul.ac.uk/history/news-and-events/items/eqe-2012---training-programme-on-european-patent-law-and-practice.html

13. Useful resources and training material

- The Delta Patents training courses and revision books, www.deltapatents.com/eqe.html
- The EPO's E-Learning Centre of the European Patent Academy, e-courses.epo.org
- The European Patent Institute (*epi*) has useful information on preparing for the EQE, as well as the rules and regulations regarding enrolment for the exams, patentepi.org/en
- Informals Tutorials, yellowsheet.wordpress.com/tutorials
- Case Law of the EPO Boards of Appeal — this advanced book provides summaries of cases and decisions of the Boards of Appeal and is useful for trainees preparing for the main EQEs, www.epo.org/en/legal/case-law

See also section H.VI below for PCT materials, as the PCT is included in the scope of the EQE.

V. Resources for Design and Copyright Law

In the UK

- The Copyright, Designs and Patents Act (CDPA) 1988 Statutory law relating to intellectual property in general, www.legislation.gov.uk/ukpga/1988/48/contents
- Design Right Rules. Rules for implementing the UK unregistered design right. The Design Right (Proceedings before Comptroller) Rules 1989, www.legislation.gov.uk/uksi/1989/1130/contents/made
- Registered Designs Act 1949 and Rules. Statutory provisions and implementing rules for UK registered designs. www.gov.uk/government/publications/registered-designs-act-and-rules
- GOV guidance on changes to unregistered designs following Brexit, www.gov.uk/guidance/changes-to-unregistered-designs
- The Designs and International Trade Marks (Amendment etc.) (E.U. Exit) Regulations 2019. This Statutory Instrument contains post-Brexit and transitional UK design law provisions, including the implementation of supplementary UK design right and continuing UK design right. www.legislation.gov.uk/uksi/2019/638/contents

13. Useful resources and training material

In the EU

- The Community Design Regulation. Essential legal provisions for community (E.U.) design rights, [www.europarl.europa.eu/RegData/etudes/BRIE/2023/751401/EPRS_BRI\(2023\)751401_EN.pdf#:~:text=Alongside%20the%20national%20design%20protection%20systems%2C%20Council%20Regulation,Community%20designs%20%28RCDs%29%20and%20unregistered%20Community%20designs%20%28UCDs%292.](http://www.europarl.europa.eu/RegData/etudes/BRIE/2023/751401/EPRS_BRI(2023)751401_EN.pdf#:~:text=Alongside%20the%20national%20design%20protection%20systems%2C%20Council%20Regulation,Community%20designs%20%28RCDs%29%20and%20unregistered%20Community%20designs%20%28UCDs%292.)
- The Community Design Implementing Regulation. Regulations for implementing Community design rights, euipo.europa.eu/tunnel-web/secure/webdav/guest/document_library/contentPdfs/law_and_practice/cdr_legal_basis/22452002_cv_en.pdf
- The E.U. Directive 98/71/EC on the legal protection of designs. E.U. directive providing the basis for Community design protection. eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:31998L0071
- OHIM guidance on the impact of Brexit in the E.U. Guidance from the E.U. on the impact of Brexit on Community design rights, euipo.europa.eu/ohimportal/en/brexit-q-and-a
euipo.europa.eu/tunnel-web/secure/webdav/guest/document_library/contentPdfs/law_and_practice/communications_president/COM-2-20_en.pdf
- The E.U. legal documents above can be accessed via the European Union Intellectual Property Office (EUIPO) website at the following link: Community design legal texts, europa.eu

VI. Resources for PCT International Law and Foreign Jurisdictions

- PCT Treaty, Regulations and Administrative Instructions Essential provisions and regulations for PCT law. PCT Treaty, Regulations and Administrative Instructions, wipo.int
- Paris Convention for the Protection of Industrial Property. The provisions of the Paris Convention regarding inter alia priority right. wipolex.wipo.int/en/treaties/textdetails/12633

13. Useful resources and training material

- The PCT Applicant's Guide. A condensed, cross-referenced guide to the PCT and common questions that arise during the international and national phase. The PCT Applicant's Guide, wipo.int
- National Law relating to the EPC. Extensive categorised tables of the most important provisions and requirements of the relevant national law in the EPC contracting states. Take note of the left-hand sidebar for full contents when using the HTML version. National law relating to the EPC, epo.org
- The Cross-Referenced Patent Cooperation Treaty. Reference book covering the Patent Cooperation Treaty and the Regulations under the PCT. Cross-references are provided between the articles and rules.
- The "Brown Book". Also known as the Manual for Handling of Applications for Patents, Designs and Trade Marks throughout the World. It should be found in your firm's library, and it is a useful guide to IP laws in other countries. It can also be accessed online with a subscription.
- PCT.App and the Complete PCT Applicant's Guide. Annotated study guide copies of PCT law and the PCT Applicant's Guide. Complete PCT Applicants Guide (fireballpatents.com). PCTApp - commented PCT Treaty - more details about book & online, fireballpatents.com





14. IP Inclusive: an overview

IP Inclusive is an initiative that promotes diversity, equality, and inclusion within the intellectual property professions. It aims to create a more inclusive working environment by raising awareness, providing support, and encouraging best practices among professionals in the IP sector. The organisation collaborates with various IP associations, firms, and individuals to drive positive change in the industry.

IP Inclusive also runs the Careers in Ideas outreach initiative aimed at improving access to IP-related careers and raising diversity in the IP professions.

As well as promoting diversity and inclusion, IP Inclusive aims to support the mental wellbeing of IP professionals (in all roles and at all career stages). It provides resources and events in conjunction with Jonathan's Voice (a mental health charity closely connected to the IP profession) and LawCare. It also has its own Mental Health Hub.

There are also several specific "communities" under the umbrella of IP Inclusive. These are groups of individuals providing a safe space to support each other, to share best practice and experiences, to learn from each other, to network or simply to enjoy each other's company. Even if you don't belong to one of these groups, you're still welcome to be involved with any of our communities as an ally.

If you would like to know more about any of IP Inclusive's events, resources (including an "EDI Starter Pack" and "Allyship: The Basics"), communities or initiatives, you can find out more on the IP Inclusive website. In its own words, "it was created by volunteers for volunteers", so please reach out should you want to get involved.





Communities within IP Inclusive

IP & ME

- Dedicated to promoting ethnic diversity within the IP sector.
- Provides resources, networking opportunities, and platforms for IP professionals from minority ethnic backgrounds and their allies.

IP Ability

- Focuses on disability inclusion in the IP profession.
- Promotes awareness, support networks, and resources for professionals with disability, neurodiversity and health conditions of all kinds, as well as for carers, and for their allies.

IPause

- Support and information for IP professionals going through (peri) menopause, as well as those who will experience menopause or are post-menopause.
- Provides information and guidance to those who work with or want to help support these individuals as well.

IP Futures

- For those in the first few years of being an IP professional, offering support and networking.
- All IP-related roles are supported, including trainee patent and trade mark attorneys, examiners, formalities officers etc.
- Works particularly closely with the Careers in Ideas team.

IP Out

- For LGBTQIA+ professionals in the IP community and their allies.
- Aims to foster an inclusive environment through advocacy, networking events, and awareness campaigns.



Women in IP

- Focuses on supporting and empowering everyone who identifies as a woman in the IP profession.
- Provides support and networking. Events range from talks and panel discussions to more informal social events. Allies welcome.

All of the communities actively welcome allies. Becoming involved with a community as an ally shows your support for that group of people.

IP Inclusive is committed to building a more diverse and equitable IP profession through the work of these specialised groups, each addressing unique challenges and opportunities within the field. Please get in touch if you would like to find out more or volunteer via contact@ipinclusive.org.uk and contact@careersinideas.org.uk.



15. Wellbeing and welfare

Becoming a patent attorney is a rewarding journey, though it can come with its own set of challenges. Balancing deadlines, incorporating feedback, managing billing, and handling client needs alongside numerous cases can feel stressful - even before factoring in exam preparation and other personal stressors. A 2019 IP Inclusive survey highlighted how the demands of the profession can impact mental health, with respondents citing high levels of work-related stress, often exacerbated by perfectionism, imposter syndrome, and reluctance to discuss challenges or take time off.

This isn't meant to deter you - there are many fulfilling aspects to this career. But if any of the above resonates with you, please know you are not alone. Support is available to help you navigate any challenges you may face along the way.

'It is better to admit when you are starting to struggle and take appropriate action than to power on and run the risk of becoming really unwell'.

- *Jonathan's Voice. Protecting your mental health and wellbeing: a guide for patent and trademark professionals.*

I. CIPA Informals

The CIPA Informals host wellbeing-focused events throughout the year as well as a regular Wellbeing Coffee Club. The Wellbeing Coffee Club is an informal get together for trainee patent attorneys to chat. Updated details of the schedule and how to join can be found on the Yellow Sheet blog.

The Informals also coordinate a Buddy Scheme which matches trainees with more experienced buddies who can answer questions you have about your training or the job in general.

The Yellow Sheet blog also contains a welfare section which lists various resources and blog posts that may be helpful.

Finally, there is also a confidential email address for trainee patent attorneys which is accessed only by trained mental health first aiders (informalswelfare@gmail.com). The purpose of this email is to provide a safe space for trainees to reach out, should they feel they need help or someone to talk to. The mental health first aiders are also trainees, so they may also have additional insight into the pressures you are facing.



II. Your Workplace

Your workplace may have a trained mental health first aider, or designated person that you may be able to have a confidential chat with. You may also consider talking to a supervisor if you are struggling. However, we appreciate that discussing wellbeing in the workplace can be hard, so if you do not want to do this, there are other options available (listed below).

Your workplace may have an employee assistance programme which offers confidential wellbeing services such as counselling and crisis support.

III. Resources

Jonathan's Voice 'JV'



JV is a mental health awareness and wellbeing charity that provides detailed resources specifically aimed at IP professionals. It includes lots of tips and ideas for improving your wellbeing.

The charity was set up in 2017 in memory of Jonathan McCartney who tragically took his own life that year. They aim to reduce the stigma associated with mental health issues and to empower people to speak up and reach out for help when they need it. JV work closely with organisations to raise awareness and support them to develop better mental health and wellbeing practices in the workplace.

You can find out more about their work jonathansvoice.org.uk. Their slogan says it best, "Together we can make a difference...". Indeed, it was through working with JV that we had the idea to set up the mental health wellbeing email, informalswelfare@gmail.com.

NHS



The NHS also have many resources on how to look after your wellbeing and mental health including a five-minute quiz that can help you to identify actions that can help you to improve your wellbeing overall,

www.nhs.uk/every-mind-matters/mental-wellbeing-tips.

Mind



Mind also provides lots of general resources for people struggling with their mental health. They also provide various additional services, so it is worth having a look at what help you may be able to get. Mind also provides a supportive online community to talk

about your mental health,
sidebyside.mind.org.uk.

The Mental Health Foundation



The Mental Health Foundation provides podcasts, videos and resources on how to help your mental health and wellbeing,
mentalhealth.org.uk/your-mental-health.

IV. Healthcare

We encourage you to reach out to your GP, or another health professional, if you are encountering long-term or severe issues related to your wellbeing.

For those of you in England, you can also access therapy via self referral,
nhs.uk/service-search/find-a-psychological-therapies-service.

For those of you in Scotland, Breathing Space is available to talk on Mondays to Thursdays (6pm to 2am) and Fridays 6pm to Monday 6am by calling 0800 83 85 87 for free. More information is available on their website,
breathingspace.scot.

Unfortunately, if you live in Wales or Northern Ireland, these services are not available, but help can be accessed either via your GP or from the sources below.

V. Help Now

If you are in imminent risk, please call 999 for immediate help.

If you are struggling and need to talk to someone, there are several organisations offering free, confidential listening/advice services. Please note that you do not have to be in a crisis to access the support below. The numbers below are given for people calling from within the UK. Please access their website for details if you need to access help from outside the UK.

15. Wellbeing and welfare

The Samaritans



The Samaritans are available 24 hours a day, 365 days a year. You can call them on 116 123 for free, email them at jo@samaritans.org or write a letter (Freepost SAMARITANS LETTERS). For more information visit the website, www.samaritans.org.

SANE



SANE provides emotional support for anyone affected by mental illness, including families, friends and carers. They can be contacted via 0300 304 7000 from 4.30pm to 10.30pm every evening, www.sane.org.uk.

Campaign Against Living Miserably (CALM)



CALM is a service for men, available by calling 0800 58 58 58 from 5pm to midnight every day. You can also contact them via webchat, thecalmzone.net/help/get-help.

Papyrus



This is a service for people under 35. They can be contacted on 0800 068 41 41 between 9am to 10pm weekdays, or 2pm-10pm on weekends and bank holidays. You can also contact them via text on 07860 039 967 or email at pat@papyrus-uk.org.

Visit www.papyrus-uk.org for more information.

LawCare



LawCare is a service for anyone in the legal community who is struggling with any aspect of their life (not just job pressure).

They can be contacted via 0800 279 6888 Monday to Friday from 9am to 5.30pm. Their webchat can also be accessed on Wednesdays from 9am to 5.30pm, lawcare.org.uk.

Shout



Shout is the UK's first 24/7 text service for anyone in crisis. Get free, confidential mental health support by texting 'SHOUT' to 85258. To learn more visit their website, giveusashout.org.

Annex 1 – checklist

Join CIPA as a Student Member (and ask membership@cipa.org.uk about the student discount card).

- Sign up to the The Yellow Sheet mailing list.
- Sign up for the Buddy Scheme.
- Join the Informals LinkedIn group.
- Watch the Lecture Archive (available via the CIPA website)
Note: CIPA membership is required to attend the lectures.
- Register for EQEs as soon as possible (this is different to enrolling for specific exams). You only need to do this once, and the deadline is 15 January in the year you want to sit the pre-exam.
- Complete the EPO training form
(see, https://link.epo.org/elearning/TrainingForm_EN.pdf)
- Register to become an EPI Student.
- Plan your route to UK and EP qualification and discuss with your manager.
- Register for exams when you're ready, and within the requisite time period (EQEs from April – July; PEBs in July)
- Join the mailing list of your local Informals regional secretary (contact details can be found on the The Yellow Sheet – The Official Blog of the Informals Committee.
- Provide feedback for UK PEB exams to the Informals Education Coordinator and the Hon. Sec.
- Check the CIPA Journal on a monthly basis (esp. the printed Yellow Sheet).
- Don't know? Just ask. No questions are silly, and everyone in the profession was a trainee once! Any member of the Informals will happily field a question.
- Access wellbeing resources if you're feeling stressed.