

ip4inno II
Workpackage V - new and updated training materials

INVITATION TO BID

Deadline for applications: 7 May 2010

The European Patent Office has been awarded a contract by the European Commission (DG Enterprise & Industry) to run a follow-up project to the successful ip4inno project (2007-2008). This "train-the-trainers" programme led to the creation of twelve 3-hour teaching modules, comprising powerpoint files, teaching notes, case studies and workshop exercises suitable for teaching applied intellectual property topics (including commercialisation and enforcement) to business advisors and technology transfer professionals.

This second project comprises (i) increasing the stock of English training material; (ii) translating the material and adapting it to e-learning media; and (iii) building a self-sustaining network of trainers. This particular invitation for offers relates solely to the first activity. Translation work will be the subject of a separate offering process later in 2010.

The project website has more information on ip4inno - www.ip4inno.eu
All of the planned work for this follow-up project can be seen from the description of work, also published on the website.

What is required?

The following pages describe the specific teaching topics for which training material is sought. In general the teaching material should be sufficiently complete to enable a business advisor or technology transfer professional who is not a patent professional or IP expert to still be able to teach basic concepts relating to IP, strategy, commercialisation and management to other advisors or to SMEs, start-ups and industry directly.

To this end, all powerpoint slides must include full teaching notes, so that a person who has never met the author of the slides knows how they are intended to be used. An example of what is meant is shown in the accompanying attachment of Exercise 5 from Module 5B ("Problem Exercises") - which takes around 30 minutes to teach with extensive classroom discussion.

Each topic can be taught by a variety of didactic means: direct lecturing, illustrative case studies, problem exercises, role-play scenarios, hands-on training (e.g. in the case of database searching). All material is to be prepared in English (at this stage).

All bidders are entitled to view the existing training material on the ip4inno website, so as to understand the basis for future work. Those without a login for this website can request one from Jeremy Philpott (details below).

What should be in your offer?

- State clearly the title of the module on which you wish to work, e.g. "Module 4C - IP Licensing".
- If bidding to work on more than one module, please make each proposal on a separate sheet of paper. See example "Blank" form also on this site.
- Define the learning goals the module is intended to meet (within the time period allocated): a bullet list will suffice. [An example of such learning goals is supplied at the end of this document for Module 1C.]
- Define the didactic method(s) you would use to teach the topic, e.g. lecture, case study, role-play, quiz, game etc, or any combination thereof.
- It is allowed to submit existing IP teaching materials you already possess, so as to indicate your intended treatment of the topic, but to which you would then add teaching notes and/or e.g. additional material like a case-study or problem exercise. Please keep in mind the European character of this project - detailed discussions of idiosyncrasies of local IP law would not be helpful.
- Define the fixed price for which the finished Module will be delivered. [Note: delivery will comprise two steps: first a draft upon which Quality Control feedback will be given, and then a final version following from revision.]
- Define the timescale in which the first draft will be delivered - normally 4-8 weeks from agreement of the contract (depending on the Module length); revisions would typically have a 2 week turnaround.
- A brief exposé of your company, agency or institution, explaining your competence and prior experience in the relevant field. This should be appended separately.
- If the submission is made by a two or more agencies working together, please make this clear so that the contract can be made accordingly.

Quality control

Note that this invitation to bid also includes an offer for quality control work to be done on the incoming modules. This work will be co-ordinated by the EPO, and require rapid turnaround of drafts and final versions during the course of the summer. The quality controller will not be eligible to check any module or other material which they themselves have produced. More details are given below.

Remuneration

Successful bidders will become sub-contractors to the project, and paid in full upon satisfactory completion of the work for which they are contracted. Payments will be made in Euros.

Location & start

The sub-contractors will work in their own offices. They may be called upon to attend a project meeting in Munich in May or June 2010; travel costs to be reimbursed by the project budget. They will be expected to start work immediately upon agreement of the contract.

Selection

Selections will be made during May 2010 based on the quality and substance of the offers made, the expertise of the bidder, price and timeliness. Selections will be subject to EC approval before contract discussions begin.

Applications

Please send your bids by e-mail to
Mr Jeremy Philpott,
Unit Manager Innovation Support,
European Patent Academy
e-mail: jphilpott@epo.org

by 7 May 2010 latest.

Title	Module 1C - using patents, trade marks & designs in business
Classroom Time	60 minutes
Topic summary	Based on existing modules 1A & 1B, prepare a 60 minute presentation solely on registered IP rights, emphasising the way these rights complement each other in a business strategy. This module to be a "taster" to attract to an audience to later modules (e.g. 1A or 5A) which deal with these topics in greater depth

Title	Module 2C - using copyright, database rights, know-how, & trade secrets in business
Classroom Time	60 minutes
Topic summary	Based on existing modules 2A & 2B, prepare a 60 minute presentation solely on unregistered IP rights, emphasising the way these rights complement each other in a business strategy. This module to be a "taster" to attract to an audience to later modules (e.g. 2A or 5A) which deal with these topics in greater depth

Title	Module 4A – IP Commercialisation
Classroom Time	180 minutes
Topic summary	Revision and updating of existing module 4A in light of new modules 4C (IP Licensing); 4D (IP financing and IP valuation); and 4E (Open innovation). Consequently this module must follow from development of 4C, 4D and 4E, and will likely borrow some parts therefrom. It will then act as a "taster" for those three modules which are more in depth. The module should also discuss "Marketing innovation", namely how to present innovative products and services to conservative investors and consumers.

Title	Module 4C - IP licensing
Classroom Time	180 minutes
Topic summary	<p>This module should explain the different types of licence agreement; in which contexts they are suitable; tips for "win-win" negotiations; terms to be avoided in contract clauses; and policing royalty rates.</p> <p>This module is to be a more comprehensive treatment of the topic than in original Module 4A, which is planned to be revised later in light of this module. It should preferably include a role-play or workshop for licence negotiation.</p>

Title	Module 4D - IP Valuation & IP Financing
Classroom Time	180 minutes
Topic summary	<p>The first 90 minutes should explain when valuation is important; differences in valuation methods according to the IP right in question; overview of valuation tools currently on the market; and mistakes to avoid.</p> <p>The second 90 minutes should introduce the topic of raising finance for innovation and the role IP plays in that, including discussion of the different sources of financing (FFF, public grants, bank loans, and equity); the so-called "Valley of Death" funding gap; and how to time investment rounds with the invention development phases, IP application costs and business growth.</p> <p>This module is to be a more comprehensive treatment of the topic than in original Modules 4A and 4B, which are planned to be revised later in light of this module. It should preferably include a role-play or workshop for a valuation situation and/or interview with a financier.</p>

Title	Module 4E – Open Innovation
Classroom Time	180 minutes
Topic summary	<p>Open innovation recognises that the in-house competence of many R&D Teams often needs to be complemented with external expertise. Partnership and collaboration are key, but this then raises questions about ownership and exploitation rights.</p> <p>This module should discuss current models for open innovation, distinguish these from "Open Source" software models, and show the role IP plays in negotiations between collaborators. Discussion of technology transfer processes is expected, as well as mention of "Model Agreements" (e.g. like Lambert in the UK, or similar ones in Germany and Denmark).</p>

Title	Module 5C - patent enforcement
Classroom Time	60 minutes
Topic summary	Based on existing module 5A, but focussing exclusively on patent enforcement, giving an overview of all the options open to an infringed patent owner and to a company accused of infringement. Alternatives to litigation to be stressed (ADR; negotiated settlements like licensing). Stages & strategy for litigation: Opposition at the EPO. This module to be a "taster" to attract to an audience to later modules (e.g. 5A) which deal with enforcement in a wider context but not as much depth.

Title	Module 5D – counterfeiting and piracy
Classroom Time	60 minutes
Topic summary	Based on existing module 5A, but focussing exclusively on the criminal actions against trademark and copyright infringement. After initial scene-setting (the global scale of the problem, the hazards to public safety, and the criminal gangs operating this twilight industry) quickly move on to explain concrete measures that businesses can take to prevent copying, detect copying and involve law enforcement agencies to take action. Particularly explain how to make a "Watching Order" with border control authorities to intercept suspect shipments. Discussion of the EU Enforcement Directive should be focussed on the practical measures for IP owners to take.

Title	Problem workshops (in the style of Module 5B)
Classroom Time	30-45 minutes
Topic summary	Existing Module 5B comprised five problem exercises, each based on a real business situation, which an audience would discuss in small groups (3-5 people) and then be guided through a "model answer" explaining a particular IP right or IP strategy. Other workshop exercises in this style also appeared in Modules 2B & 5A. More workshops in this style are sought. They can be on a particular IP right, or a related issue (like licensing or enforcement). Particularly workshops to fit with Modules 4A-4E, 5C & 5D are sought.

Title	Revisions to existing modules 1A to 6B
Classroom Time	180 minutes each
Topic summary	The existing twelve modules from the first ip4inno project are now over two years old. Offers to update and improve the teaching notes, examples, case studies etc are invited. Please note that revision to Module 4A is already specifically planned in this invitation to bid (in light of new modules 4C, 4D & 4E).

Title	Anything else?
Classroom Time	? minutes
Topic summary	Applicants are invited to suggest a new Module not seen in the existing materials, or amongst those proposed in this invitation to bid. In the "Learning goals" describe the intentions of the new Module, and what key issues in IP strategy the audience will learn.

Title	Quality control
Topic summary	On behalf of the EC, the EPO will retain ultimate responsibility for the revised and new Modules. However, a partner is sought to support this work, and to check submissions in parallel.
Delivery time	Drafts and final versions will need to be checked and feedback given to the EPO within 5 working days of receipt. The work will be staggered over the summer of 2010.
Delivery price	Specify a rate for the work, based on the time taken to check each teaching-hour of material. This invitation to bid comprises 15 teaching-hours materials, plus possibly another 20 teaching-hours worth of updates to existing modules and/or new problem exercises.

ip4inno II – example of a completed Offer Form

Title	Module 1C - using patents, trade marks & designs in business
Classroom Time	60 minutes
Delivery time	6 weeks to first draft; plus 2 weeks to respond to revision request
Delivery price /€	---- Euros
Didactic method(s)	Lecture and spot quiz at the end to summarise
Learning goals	<p>By the end of this module the audience should know:</p> <ul style="list-style-type: none"> • that registered rights require formalities, but are easier to prove ownership, whereas unregistered rights arise without formalities but their ownership can be harder to prove • the different types of registered protection: patents, utility models, trade marks and designs • the concepts of novelty, inventiveness, utility and unity for patents in Europe; which inventions are excluded from patentability and why • scope of protection for a patent (territory; duration; claims & the acts which infringe) • what may or may not be registered as a trade mark in Europe • scope of protection for a trade mark: territory; duration; acts which infringe or not • the difference between ® and ™ • what may or may not be registered as a design • scope of protection for a design: territory; duration; registered & unregistered; acts which infringe or not • the basic principles (& costs) in the application procedures for registered rights, e.g.: <ul style="list-style-type: none"> ○ priority date; search, publication, examination & grant (and opposition) for patents; ○ priority date; examination, search, publication, opposition and registration for trade marks or designs • a basic overview of the national, European and international routes for filing patents, trade marks and designs; indication as to costs • how patents, trademarks and designs combine in a single product (e.g. a mobile phone), and how they protect different aspects - done as quiz • where to go for more information; other competent agencies
Attachments	See ppt file ipbusiness.ppt which we already use, to which we intend to add teaching notes and a spot quiz.