

ip4inno II  
Workpackage V - new and updated training materials

## INVITATION TO BID

Deadline for applications: 21 September 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](http://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 business planning with IP and various aspects of IP enforcement, 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 4B - Business planning with IP".
- 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 - preferably 4 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

Quality control will be co-ordinated by the EPO, and is performed by EBN<sup>1</sup> who were appointed for this task earlier this summer. EBN require rapid turnaround of drafts and final versions during the course of the autumn.

### 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.

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<sup>1</sup> European Business Innovation Centres Network [www.ebn.be](http://www.ebn.be)

## Location & start

The sub-contractors will work in their own offices. They may be called upon to attend a project meeting in Munich in October 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 September 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](mailto:jphilpott@epo.org)

by 21 September 2010 latest.

Title	Module 4B – Business planning with IP
Classroom Time	180 minutes
Topic summary	<p>Revision and updating of existing module 4B in light of new modules 4C (IP licensing); 4D (IP financing and IP valuation); 4E (Open innovation); and revised module 4A (IP commercialisation).</p> <p>Consequently this module follows from the recent development of these related modules, and will likely borrow some parts therefrom.</p> <p>The module should discuss how to select the most appropriate IP rights for different business models (technology licensing; new product sales; innovative services; creative industries), and then move on to discuss integrating an IP plan (e.g. applying for patents, or using branding and "First Mover Advantage") with the business development plan as a whole. Consideration should be given to how to identify expertise that needs to be brought in to support this process (lawyers, marketing experts, R&amp;D scientists etc).</p> <p>The module should preferably include a workshop exercise on business planning.</p>

Title	Module 5A – IP enforcement
Classroom Time	180 minutes
Topic summary	<p>Revision of the existing module 5A on IP enforcement, in light of the development of new modules 5C (patent enforcement) and 5D (piracy and counterfeiting) described below. Inevitably this means that work on revision to module 5A must wait until 5C and 5D have been completed. Module 5A should cover civil litigation for patents and designs, as well as civil and criminal enforcement for trade marks and copyright; as well as Alternative Dispute Resolution (ADR). For each IP right it should outline which acts infringe and any "defences" to mitigate such acts.</p> <p>It is not the intention of this module to teach how to litigate, but rather to place all these topics in a business context to enable the most cost-effective strategies to be adopted (an this will vary across business models and IP rights). The module should explain how disputes can be prevented from arising (often between former partners); avoiding accidental infringement by due diligence and searching IP databases; how to respond appropriately and proportionally to an infringement; and how to respond to an accusation of infringement.</p>

Title	Module 5C - patent enforcement (new)
Classroom Time	60 minutes
Topic summary	Based on 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, including 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 with regard to patents.

Title	Module 5D – counterfeiting and piracy (new)
Classroom Time	60 minutes
Topic summary	Based on module 5A, but focussing exclusively on the actions against criminal infringement of trade marks and copyright. After brief 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.

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	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"> <li>• 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</li> <li>• the different types of registered protection: patents, utility models, trade marks and designs</li> <li>• the concepts of novelty, inventiveness, utility and unity for patents in Europe; which inventions are excluded from patentability and why</li> <li>• scope of protection for a patent (territory; duration; claims &amp; the acts which infringe)</li> <li>• what may or may not be registered as a trade mark in Europe</li> <li>• scope of protection for a trade mark: territory; duration; acts which infringe or not</li> <li>• the difference between ® and ™</li> <li>• what may or may not be registered as a design</li> <li>• scope of protection for a design: territory; duration; registered &amp; unregistered; acts which infringe or not</li> <li>• the basic principles (&amp; costs) in the application procedures for registered rights, e.g.: <ul style="list-style-type: none"> <li>○ priority date; search, publication, examination &amp; grant (and opposition) for patents;</li> <li>○ priority date; examination, search, publication, opposition and registration for trade marks or designs</li> </ul> </li> <li>• a basic overview of the national, European and international routes for filing patents, trade marks and designs; indication as to costs</li> <li>• how patents, trademarks and designs combine in a single product (e.g. a mobile phone), and how they protect different aspects - done as quiz</li> <li>• where to go for more information; other competent agencies</li> </ul>
Attachments	See ppt file ipbusiness.ppt which we already use, to which we intend to add teaching notes and a spot quiz.