IP5 Project Management

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The beginning...

- IP5 was launched in 2007 as a forum for the world’s five largest patent offices to --
  - Exchange views and identify opportunities for cooperation on common challenges:
    - Patent examination workloads and backlogs
    - Patent quality, and
    - Inefficiencies in the international patent system
IP5 Vision

- The following year, in Korea, the IP5 developed the following agreed vision, centered on work sharing, to guide its work going forward:

  “The elimination of unnecessary duplication of work among the offices, enhancement of patent examination efficiency and quality, and guarantee of the stability of patent right.”

- 10 Foundation Projects
5 years in...

• Emergence of the Global Dossier concept, plus later addition of Trilaterial work sharing topics led to a realignment and redirection of work.

• To this end, at the 2012 meeting hosted by the EPO, the offices agreed to use the Global Dossier as a focal point for tying the work of several ongoing IT-related foundation projects together toward a common goal.

• In 2013, IP5 agreed on new management structure:
  – Do not have to move in lock-step
  – Revisit structure of working groups, particularly WG3 in view of addition of Trilaterial topics
IP5 Governance

IP5 Governance 2013 - 2017

- Sponsors
  - IP5 Heads of Office
- IP5 Deputy Heads
- Programme Management Group (PMG)
- IP5 Statistics Working Group

WG1: Classification
- Harmonisation of classification
- IP5 input to improving the IPC

WG2: IT-related initiatives
- Global Dossier (OPD, CCD, PDX, ePCT and others to be decided)
- Mutual Machine Translation
- Common Documentation
- Secure Data Exchange
- Data Standards (XML)
  - Global Dossier Task Force

WG3: Work Sharing & Quality
- PPH
- PCT: PCT roadmap, PCT metrics, Collaborative Search & Examination, etc.
- Paris Route Timeliness
- Search Recodification
- Quality
- Training
  - Patent Harmonization Expert Panel
Today...

- Since Global Dossier development has reached a steady state, the IP5 has reached another point where identification of the guiding path forward may be in order.

- Aside from Global Dossier, CPC and related activities, the remainder of IP5 work is largely ad hoc projects of some relative level of interest or importance, but oftentimes with no clearly defined objective.

- To give its work proper direction, the IP5 should take stock of its original aim—work sharing cooperation as a means to address examination workloads, efficiency, and quality—as well as its primary strength, which is technical expertise and experience, and concentrate its work accordingly.
Proposals

1. Identify a new IP5 Vision to provide an updated guiding strategy, and
2. Perform a review of current IP5 work/structure to ensure that:
   1. Our projects have clearly defined objectives, milestones, and timelines, and
   2. Our outreach with stakeholders is targeted and prioritized.
IP5 Vision

• In considering the way forward, the Offices should also take note of recent developments and inputs:

  – Stakeholders have expressed the need for offices to further optimize work sharing, seek ways to reduce costs, and decrease system redundancies.

  – The 4th Industrial Revolution is currently underway, presenting the offices with new challenges and opportunities to learn from one another.

  – As offices have decreased their pendency, focus has shifted more towards aspects of quality, including how to define and measure it and areas for improvement.

• New vision will be endorsed by the Heads of Office tomorrow.
Evaluation and Reorganization

• Goals:
  – For each project identify objectives, timelines, etc.
  – Prioritize projects in order to streamline agendas and account for resource demands.
  – Identify completed projects/end projects that have run their intended course.
  – Review IP5 framework and consider appropriate structure for cooperation.
Evaluation Work Plan

• Two Phases:
  – Phase 1: Data Gathering
    • Description, Project Type, Objective Benefits, Current Status, Important Milestones, Completion Criteria, Timeline, Is stakeholder feedback necessary? (If yes, describe need)
  – Phase 2: Evaluation and Prioritization
    • Alignment with new IP5 Vision, Benefits to External Stakeholders, Office Benefit, Resource Requirements, Maintenance Requirements
IP5 Industry Involvement

- Stakeholder benefits category.
- Update and discussion at next ICG Meeting.
Goal:

The result of the exercise should be to agree on which projects should form IP5 cooperation from 2018 onwards and how best to structure the group in order to realize our goals and objectives.