



**Europäische
Patent-
organisation**

Verwaltungsrat

**European
Patent
Organisation**

Administrative Council

**Organisation
européenne des
brevets**

Conseil d'administration

CA/105/23

Orig.: en

Munich, 24.11.2023

SUBJECT: Annual Work Plan 2024

SUBMITTED BY: President of the European Patent Office

ADDRESSEES: Administrative Council (for opinion)

SUMMARY

The Annual Work Plan 2024 serves as a guide, setting the direction of the EPO's efforts for the year ahead, as we advance towards our sustainability strategic goal. It delineates the activities across five key drivers, building upon the foundation laid by our previous strategic plan and preparing the Office to address the forthcoming challenges outlined in the Strategic Plan 2028.

Recommendation for publication: Yes



Europäisches
Patentamt
European
Patent Office
Office européen
des brevets

Annual Work Plan 2024

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Executive summary

During 2024, the EPO will concentrate efforts towards all five drivers of the EPO Strategic Plan 2028, subject to its endorsement by the Administrative Council.

The first driver is **People**. In 2024 we will attract talent, implementing a new approach to talent planning; deepen our engagement with candidates; and develop the Young Professional programme. Talent development will follow the 70/20/10 approach – encompassing learning on the job (70), peer-to-peer networks and knowledge sharing (20) and official training (10) – with skills check-ups, iLearn days, and a focus on ensuring that all learning needs for the patent grant process are met. Manager training will continue to evolve; the rewards process will be adapted to support the performance development process; and we will support professional mobility, focusing on formalities officers. We will also conduct a staff survey on the New Ways of Working pilot and continue to strengthen social dialogue, building on the progress made in 2023.

The second is **Homes** – both physical and virtual. Guided by the highest health and safety standards and the move to carbon neutrality, we will propose a new building investment portfolio to the Administrative Council to provide professional homes in which staff can collaborate and network. Similarly, investment in enhancing our digital homes will include the installation of new equipment in bookable workplaces; the provision of new laptops; and the migration of all administrative documentation to a single repository. We will manage our home effectively by strengthening financial sustainability through the Financial Study, further digitalising and simplifying financial processes, and increasing procurement efficiency. The EPO will also enhance its sustainability reporting and continue to modernise external governance.

Under the third driver, **Technologies**, the EPO will continue to improve the availability and reliability of systems and develop our key tools based on users' needs. An important part of this journey is cutting paper copies out of the patent grant process (PGP) and continuing our journey towards a fully digitalised PGP and corporate services. We will invest in integrating new AI tools into classification processes and in extending machine translation tools to support most official languages of member states.

The fourth driver is **High-quality, timely products and services**. We will deliver complete, accurate searches; comprehensive written opinions; and thorough and consistent examination by developing efficient, user-friendly online tools with inbuilt quality checks to speed up communications and reduce errors. We will also focus on accurate and timely classification of prior art and digital allocation of files to examiners, promoting flexibility and collaboration. The EPO will aim to deliver 90% of standard searches on time and to send 80% of standard grants within 36 months. We aim to maintain the opposition stock below 5 000 and to achieve 70% of decisions on standard files within 18 months.

Driver five, **Partnerships**, includes measures to broaden our co-operation with member states and strengthen the European Patent Network (EPN), while supporting enhanced quality in the patent system, addressed through the Standing Advisory Committee before the EPO (SACEPO), in additional Stakeholder Quality Assurance Panels (SQAP) and in meetings with user associations, as well as by revising for Guidelines for examination, supporting the Unitary Patent system, and monitoring of the decisions of the Unified Patent Court (UPC), particularly the Court of Appeal. Furthermore, training and certification programmes led by the European Patent Academy, such as the European Qualifying Examination (EQE) and the European Patent Administration Certification (EPAC) will contribute to increasing quality. In 2024 we will also focus on accessibility with a new simplified fee structure offering additional support for micro-entities, which will be presented to the Administrative Council. Through the new Observatory for Patents and Technology, we will build knowledge and awareness with the launch of the digital library of studies on technology and innovation and a data desk to present patent data comprehensively and accessibly.

Implementation of SP2028 in 2024

1. Driver 1 – People

Attract the best

We will continue to attract more of Europe's top talent, contributing further to our reputation as a knowledgeable and professional organisation. Prominent in this will be our focus on **recruiting diverse talent** via active sourcing, social media communication and presence at job events. In 2024, we will increase actions specifically with respect to geographical hires, women, neurodiversity, (dis)ability, LGBTQ+ and promote the use of gender-neutral language in communication with candidates. Work will be done to make the EPO job page more appealing to diverse groups.

A new, harmonised approach to **Talent Planning** will be implemented stepwise office-wide to allow greater alignment with the evolution of the Office's needs, especially in view of technological changes we face. Starting in 2024, it will cover new dashboards, new multi-year talent plans and quarterly staffing requests. It will allow us to define learning and knowledge expectations as well as related capacity planning. With an office-wide, harmonised approach to talent planning, the EPO will be equipped to better plan for and anticipate future needs, as well as to accompany our staff through the evolution of their roles and functions, hence contributing to higher adaptability and resilience of the EPO talents and, ultimately, of the whole organisation.

To ensure the speedy incorporation of talent into the EPO, **candidate pipelines** will be kept full according to a **three-year rolling plan** and in anticipation of recruitment needs for examiner and non-examiner areas. We will enhance training for pipeline candidates and deepen interactions with candidates to maintain their engagement.

The **Young Professional (YP) programme** will also be further developed, contributing to the EPO's talent planning. In 2024, we will aim to expand the number of universities based on "hard to find" technical profiles and geographical diversity. The number and impact of YP secondment will be increased.

Develop talent

Talent development will continue to be an important priority for the Office, following the established **70/20/10 approach** and leveraging a diversity of learning formats – from the iLearn platform to the classroom. **Skills check-ups** will be carried out to evaluate learning needs and focus learning where it is needed most. We will continue to fill skill gaps across the organisation by providing learning associated with the different skills according to the 70/20/10 model. iLearn days will be focused on cross-functional skills, as these foster

development and create engagement, and personal effectiveness courses will support efficiency throughout the EPO.

One key priority for development in 2024 will be to ensure that all **learning needs for the patent grant process** are met. Following completion of the **Ansera training**, we will run a skills check-up to evaluate the level of familiarity with the tool. Another key objective for 2024 is to align the learning offer for **formalities officers** with the future development of the role (see below), with increased attention given to the formal European Patent Administration Certification (EPAC) certification.

Knowledge management efforts will continue to support regular **Continuous Knowledge Transfer (CKT)** deliverables and spread CKT further in the EPO. These efforts will especially focus on how we deliver the 70 – learning on the job – and will further facilitate speedy information retrieval via revamped tools. We will also ensure critical knowledge is not lost by implementing a state-of-the-art **offboarding** process.

The **Management Community** will continue to support managers learning on the job, but also with training. The first-time manager training will continue evolving and an aspiring manager programme for high-potential management talent will be launched. Clear communication with managers will continue with strategic briefings, "office hours" events, manager briefing kits, etc. and include initiatives such as the publication of regular, curated tips for managers.

The EPO Talent Academy and the European Patent Academy will continue to develop synergies between the internal and external learning offerings such as EPAC and EQE (European qualifying examination). In addition, we will use a single pool of well-trained experts and instructors for iLearn offerings. In 2024, it will be also explored to set up iLearn days that bring together both internal and external participants.

The EPO's **performance development process** (objective setting, reporting and individual development plans) will be supported by the evolution of the rewards process. By bringing the rewards closer to the achievements and ensuring staff contributions are recognised in a timelier manner, we aim to have a positive impact on engagement.

Support mobility and flexibility

Professional mobility offers a strategic win-win for the EPO and its staff. It offers development opportunities and fosters engagement. It also helps to balance resources as business demands change, to deliver high quality products and services, in core tasks and strategic projects. Finally, it contributes to the One-Office culture and a more unified community of professionals.

This is reflected in the continuous development of professional roles in the Office. A special focus will be given to **formalities officers**, reviewing their role and ensuring their future

readiness to best contribute to the patent granting process. Mobility and upskilling opportunities will be considered where appropriate to ensure an efficient rebalancing of capacity in line with the EPO's needs and the aspiration of our staff to bring value while being offered opportunities to grow and develop.

The **New Ways of Working** pilot has already allowed a profound transformation in how and where we work. It is having a significant impact on the engagement of our staff, as well as on attracting and mobilising talent. A thorough evaluation is underway, which will consider all aspects and draw comprehensive recommendations to inform a possible future scheme. A dedicated staff survey will be launched in early 2024 to gather the views of EPO staff and complement the data being gathered for the evaluation.

Social Dialogue

The EPO will continue its path to further **strengthen social dialogue**. Regular exchanges (over 100 meetings per year – statutory and non-statutory) highlighted a professional and constructive atmosphere, where all parties could exchange, listen, understand each other's position and finally conclude on the matter at stake. This yielded concrete results in 2023, including the introduction of an updated staff committee election framework and the subsequent smooth running thereof in June 2023.

Building on this progress, the **social agenda** will be concluded for 2024. As every year, staff representation also has the opportunity to propose topics which will be duly considered by the Office. The agenda will span a variety of topics, such as: further integration of diversity and inclusion elements aiming to embed these in the DNA of the Office, i.e. by reviewing parenthood benefits and regulations towards gender-neutral language; a review of the home loans scheme and efforts to have a positive impact on sustainability with the introduction of a new green loans scheme; and follow-up of the financial study, as a regular check-up on the EPO long-term financial sustainability.

2. Driver 2 – Homes

Physical homes

A proposal for a new **building investment portfolio** will be presented to the Administrative Council for their decision in 2024. New projects will be initiated only after approval from the Council.

Safeguard health and safety

We will continue to maintain the **highest standards of health and safety** in our professional homes for the benefit of our staff and visitors. Already ongoing activities to adapt the current fire safety concept of the PschorrHöfe (Pschorr) complex in Munich to more modern approaches will continue. In addition to the continuing works in Pschorr 1-4, we will initiate the tender procedures for the necessary renovation of the Pschorr garage complex and the fire safety upgrade in Pschorr 5-6. In The Hague, the former pond area, which presented a safety hazard for staff and equipment in extreme weather conditions, will be transformed into a green space filled with native plants to support biodiversity.

Contribute to environmental sustainability

Proposals for how to further improve the carbon footprint of EPO's buildings will be developed and presented to our bodies, with the clear objective to enable EPO's ambition to become **carbon neutral by 2030**. In Vienna, we will complete the new building that will be a sustainability flagship for the EPO. Renovation works will be in full swing by early 2024, while indoor works have already started with the installation of technical systems to follow. The full works on site are on track to be completed on time – by the end of 2024 – and within budget.

Support sustainable staff engagement

The EPO aims to secure a **new building for our staff in Berlin**, which fulfils the EPO's requirements for a modern, sustainable, and ergonomic workspace, in the centre of our host city, that will foster staff engagement. Proposals for the way forward will be presented to the governing bodies in the course of 2024.

Digital homes

Enhancing our digital home

In 2024 we will continue to invest in providing an **optimal digital environment** for our staff to work in, including equipping our bookable workplaces with 38" screens similar to the ones used for homeworking, making the transition between home and the office seamless. We will also start providing new, more powerful laptops, with the latest software, and

touchscreens that will further enhance the possibility to annotate files digitally, a project that will span into 2025. In parallel, our video-conferencing equipment will continue to be upgraded to fully support hybrid working.

The project to migrate all our **administrative documentation** to a single repository will continue to progress, and as from 1 January 2024, it will implement the **EPO's retention policy** in a configurable way, which will make it more efficient to ensure improved data management and compliance with regulatory requirements.

Moreover, the **planning tool** that allows our staff to plan and report where they work from on a given day (teleworking, on-site) will be adjusted following the decision taken by the Administrative Council after the pilot on New Ways of Working, to ensure that it continues to support the needs of team members and managers.

Communications in our digital home

We will continue to enhance communications in order to strengthen our corporate culture – particularly in the hybrid environment. In 2024, this will include a comprehensive communication campaign on the New Ways of Working, as the EPO evaluates the pilot scheme and looks towards the future. We will also reinforce the importance of **hybrid and online events** (in line with the EPO's New Ways of Managing Events policy), which has already resulted in a significant increase in the number of attendees to EPO events, thus extending outreach and maximising their impact. For the EPO's flagship event, the **European Inventor Award**, the new TV style format has increased the audience by thousands, and this online format will continue to be followed for the 2024 event. Internally, we will continue to reinforce transparent, two-way communication on key strategic topics related to the EPO's long-term sustainability.

Managing our homes

Financial sustainability

In 2024, the second phase of the **Financial Study** will define risk mitigation measures and assess their financial impact with a view to further secure the EPO's long-term financial sustainability. The third and final phase will propose possible options for managing the Reserve Funds for Pensions and Social Security (RFPSS) and EPO Treasury Investment Fund (EPOTIF) in a way that reduces the Office's vulnerability to external factors such as volatile inflation. Looking into the future, the EPO will further closely monitor the **coverage ratio** which reflects its progress towards long-term financial equilibrium and a positive equity.

Process simplification and digitalisation

In 2024, the EPO will leverage the implementation of the **activity-based budget** to further increase transparency on the forecast and budget figures. We will also continue to **digitalise**

and simplify our financial processes, and in procurement the roll out a state-of-the-art e-procurement technology (iValua) office-wide and digital tools to progressively allow for integration with our financial planning tools. The EPO will further simplify its IT landscape by implementing the new SAP Technology S4/Hana, bringing further efficiency in finance and procurement processes as well as improving users' experience.

Value for money

In the area of procurement, the EPO will continue to develop its **vendor management** capabilities in order to increase efficiency, understanding of the market and prevent vendor lock-in. We will also keep working towards the implementation of a policy for **sustainable procurement**, focusing on the environmental and social responsibility of the EPO and our suppliers.

Keeping our homes healthy, safe, and secure

In 2024, we will continue to apply clearly structured **best practices and guidelines**, pursuing continuous improvement in aspects related to people, quality, data, and the environment and maintaining our certifications as further evidence of our commitment to excellence.

With sustainability as main goal, the EPO will also enhance the alignment of its **sustainability reporting** with the Global Reporting Initiative (GRI). Building on the GRI Content Index released in September 2023, the enriched reporting will bring more transparency and comparability with global best practices for sustainability reporting.

Strong governance

A first basket of **modernisation measures to the EPO's external governance** was fully implemented in 2023. The second basket, containing technical improvements, has been completed at the end of 2023 and the rollout will conclude at the beginning of 2024, while work continues on defining a third and final basket to be submitted to the Administrative Council for approval later in the year.

3. Driver 3 – Technologies

Build a resilient digital infrastructure

In 2024 the EPO will take further steps to continue improving the **availability and reliability** of our systems for the benefit of our users. We will do this by continuing to migrate systems (such as INPADOC and the Legal Status Service) to a highly secure and reliable Cloud environment, which will allow us to increase availability to 99% by the end of 2024.

In order to be able to take proactive measures that minimise disruption to our services, we will invest in **state-of-the-art observability tools** in 2024, allowing the measurement of a system's current state based on the data it generates, such as logs, metrics, and traces. This will improve the time we need to react to and notify incidents as we start to decommission legacy monitoring tools, as well as provide us with better insights into our systems.

Drive digital transformation

We will continue to follow a user-centric approach in the development of our tools. In 2024, we will improve the **ergonomics and usability** of our key tools: Patent Workbench, Digital File Repository (DFR), Ansera and MyEPO Portfolio. DFR will be enhanced to provide better support to the division and formalities officers in their daily tasks. We will carry on investing in our design system, which already covers the majority of our web-based applications. We will persist working in **fast, iterative development cycles** with an even stronger focus on change management.

In the area of **IT co-operation**, the collaborative approach that has so far proven successful will continue. This includes the implementation of Front Office in more member states and, in 2024, extending this offer to the EPO's validation states. The same approach will apply to the Ansera-based Search tool.

To keep up the momentum in our **simplification and digitalisation** journey, in the patent grant process (PGP) we will keep our focus on analysing and re-engineering paper-oriented processes in 2024. The PGP runs largely electronically but paper still plays a significant role. While 98.8% of submissions are received electronically, 26.9% outgoing communication pages are still sent on paper and internally 8.8 million pages were printed locally in the first half of 2023. Although enormously reduced in quantity, paper still plays a legal and workflow role in the PGP. The EPO still receives some submissions from applicants on paper, sends outgoing communications on paper (mainly PCT-related) and - to a small extent - paper is used in internal processes, mainly at the beginning and end of the PGP process. Most internal printing is due to personal ways of working of examiners where the prints have no legal value. We will look first into ways of reducing paper printing without changing tools, as some processes can already be supported electronically (i.e., digital certificates, third party

observations filing, mailbox, etc). In the few cases where a legal change is needed, the **PGP Simplification Board** will make sure that these changes are triggered and implemented following proper user consultation. Some of these changes were already approved in 2023 and will be implemented in 2024 (i.e., the second basket of legal changes to support digitalisation).

We will also push ahead with the **digital transformation of our corporate functions**, with the next steps in providing more modern and transparent financial processes. Following improvements realised through basing the budget presentation on activities, we will introduce quarterly budget revisions, allowing us to better monitor expenditure on different activities, and to fine tune our cashflow management. In parallel with this, we will generalise the use of better procurement tools, already piloted by some units in 2023, and prepare for the migration of our financial backbone to the latest software. For our HR function, we will leverage the new **HR Simplification Board** to look further into processes that can benefit from more self-service, thus making them more efficient. Proposed changes to tools will follow in a simplified and user-friendly way, closely coordinated with the social dialogue agenda for 2024.

Deliver excellence through the use of digital tools

Under the Strategic Plan 2023 (SP2023), we successfully moved to **paperless processing** for 99% of all patent grant actions in the Patent Workbench. In 2024, we will reach 100% coverage of our PGP processes, while increasing the support to formalities officers for the processing of existing tasks in the legacy systems (e.g. CASEXPrima). Our aim is to be able to decommission this legacy system at the end of 2024, enabling the sending of structured communications to the external users instead of image-based PDFs.

In 2024, and after successfully developing an **artificial intelligence** (AI) based pre-classification engine under SP2023, we will continue to invest in the integration of the new AI tools into our core **classification** processes, from pre-classification to reclassification. We will keep our focus on the core classification task, as this consumes a significant proportion of internal resources, and we will modernise older systems (e.g., Clasma) along with a revision of its role and the processes supported.

Leverage AI for our needs

We will look further in 2024 at leveraging AI to improve the quality and efficiency of our processes and services, building on what we have learned in the last years. For **classification-related tasks** in particular, we will improve current models to ensure seamless processing of the ever-growing volume of prior art. Internal **machine translation** tools, developed under SP2023, will be extended in order to support most of the official languages in our member states. We will also plan to work on several support tools based on non-confidential content. Our primary focus will be on harnessing the power of **large**

language models to process our extensive repository of knowledge, which includes patent manuals, caselaw, guidelines, and more. The aim is to seamlessly deliver this valuable information to examiners and formalities officers through the PGP toolset, while ensuring robust **data protection** safeguards are in place.

4. Driver 4 – High-quality, timely products and services

Improve quality throughout the PGP

In 2024 we will consolidate the improvements made in **quality, consistency and timeliness** across all products and fields of technology and continue to enhance our dialogue with our applicants and their legal representatives. Our focus will remain on delivering complete and accurate searches and comprehensive written opinions and a thorough and consistent examination.

Quality at source

In 2024, we will persist in our course to develop **efficient, user-friendly online tools** that support digital interactions with the EPO and include inbuilt quality checks where possible. Our electronic filing tools will support the targeted reduction of errors, while the MyEPO Mailbox will result in faster communications between the Office and representatives. MyEPO Portfolio will present accurate, real-time overviews of patent dossiers and the number of actions available to users will be expanded resulting in a true collaborative, digital workplace. We will also explore how interactive guidance and assistance solutions can guide users in their interactions with the EPO, helping to reduce the number of formal issues upfront.

Accurate and timely classification of our prior art

In 2024, we will review all **internal classification processes**, including the role of para-technicals, and expand our use of the **latest tools and technologies** (such as Classera and Canopée) to ensure timely and accurate classification, as well as technical acceptance of files in the right units and accurate allocation. The next generation of AI tools will also be introduced to support pre-classification, classification and re-classification, automating the work to increase quality, speed and efficiency. All classification activities will be integrated into the EPO's search tool, Ansera, and the Patent Workbench. While continuing to encourage and support other patent offices both within the EPC and globally in their uptake of the Cooperative Patent Classification (CPC) scheme, we will also expand further our databases of prior art so that they remain the most extensive in the world: complete, accurate, up-to-date, and accessible.

Getting the right file to the right examiner and division at the right time

In 2024, most of the benefits of the new **Digital File Allocation** tool will materialise. Our aim is to increase quality by improving the technical acceptance and the allocation of files – so that the file reaches the right examiner and division at the right time. We will create a fully digital system for the allocation of work to examiners (including opposition cases), leveraging AI and other techniques to provide the best technical match between a file and an examining division. This will enable us to optimise the capacity of examiners and formalities officers, providing more flexibility and supporting the achievement of our quality and timeliness goals,

also in the context of the new core business structure around technology communities. The new digital system will foster flexibility and collaboration, so that we can adapt to the rapid changes in incoming workload and technological trends, which presently occur more often due to converging technologies and the rapid evolution of many technical fields. We will adapt the workload management and distribution to support the focus on quality and timeliness.

High-quality searches and written opinions

In 2024, we will ensure that our searches continue to be based on the world's most extensive databases and powerful search and translation tools. The pre-search algorithms will be improved with the assistance of AI to ensure that highly relevant search results are presented to our examiners, including the citation of non-patent literature (NPL) documents that are found beyond our internal databases. Old legacy search tools (e.g., Epoque, CiteNPL, Seastar) will be decommissioned as we transition fully to Ansera. The EPO has a long standing practice of allocating the prospective examining division already at search stage. Consultation is an integral component of our search practice. To improve quality and consistency of both the search and written opinion, from 1 November 2023, the three-person division is consulted at the search stage on every file. We will also explore the introduction of AI-based tools in the drafting of the communications process. We believe that these measures will assist in ensuring that our written opinions are thorough and accurate, covering all aspects of the invention and any objections are fully supported by the prior art. During 2024 we will carefully measure and assess our progress using indicators such as citation of Asian prior art and standards, our Directorate Quality Audit (DQA) results, harmonisation dashboard and use of our complaints, feedback and the Ombuds Office service.

High-quality and consistent examination

In order to best support our examiners and formalities officers to bring forward their expertise, in 2024 we will develop further new tools like **ELIS** ("Empower Learning, Inspiration & Sharing"). These tools will help examiners, formalities officers and administrative employees to improve quality and consistency by providing access to the legal texts, expert advice, guidance, training and tools available for the PGP, as well as the most relevant colleagues for knowledge-sharing. We will also seek to learn and improve by making use of feedback from opposition procedures and outcomes of the Boards of Appeal, and enhance the **harmonisation of practice**, especially for emerging technologies. The Communities of Practice, will be strengthened in 2024, supporting exchange of expertise in areas such as AI and computer implemented inventions.

We will further develop the "**Shared Area**" in MyEPO, introduced in July 2023, as a tool to support a more collaborative, non-sequential examination process. By discussing and clarifying areas of disagreement early in the process, the applicant and the EPO have the

opportunity to improve quality and reduce inefficiencies. Equally, internal tools will strengthen **collaboration within the division** and allow our examiners to co-edit and co-draft all PGP actions in the EPO's Patent Workbench – harnessing their combined expertise. In 2024, we will track our progress on harmonisation of our practice and assess the effectiveness of the new Shared Area in MyEPO.

Enhance timeliness in the patent grant process

The timeliness of our products and services remains an important factor for our applicants.

A timely search – We will aim to deliver 90% of standard searches¹ on time. For our different products those timeliness targets are:

- EP first and second filings: six months
- ISA and searches for our national offices: seven months (down from nine months in 2021)
- Euro-PCT bis searches: eight months (down from 10 months in 2023)

A timely examination – We will aim to send 80% of standard grants² within 36 months.

A timely opposition – We will maintain the stock below 5 000 and strive to come back to the timeliness achieved before the pandemic at 70% within 18 months for standard files³.

End-to-end timeliness – Our target for the end-to-end processing of all routes is four years from the request for a grant of an EP patent. To prevent unacceptable delays and a growth of the backlog of old files we will continue to “compress the tail” by:

- moving the cut-off year of old files by one year to “valid examination request before 2019” whereby only 10 000 such files awaiting applicants' action should remain at the end of the year, and by
- keeping the amount of examination files awaiting examiner action for more than 30 months at around 1 000.

Accelerating the process – PACE⁴, third party observations and divisionals

To satisfy the needs of applicants who would like to **accelerate the patent grant process** we will aim for each examination action to be delivered within three months if a PACE

¹ Excluding cases with (a) lack of unity, (b) lack of clarity or (c) incomplete search.

² Excluding cases with (a) more than one request for extension of time limits to reply, (b) more than one late fee payment or (c) request to re-schedule oral proceedings.

³ Excluding cases with (a) more than one opponent, (b) request to reschedule oral proceedings, or more than one oral proceedings, (c) division that includes a legal member.

⁴ Programme for accelerated prosecution of European patent applications.

request has been filed. In 2024, MyEPO Portfolio will provide support to the implementation of PACE, making the process of requesting the acceleration of the examination proceedings more transparent and user-friendly. The legacy third party observations form will be also replaced by a more modern and simpler one in 2024, enabling the decommissioning of paper filings and the legacy systems by the end of the year.

5. Driver 5 – Partnerships

Partner for quality

Skilled quality professionals

The European Patent Academy will continue its flagship training and certification programmes for patent professionals, the **European Qualifying Examination (EQE)** and **European Patent Administration Certification (EPAC)**. The 2024 EQE will be held in March, in parallel with ongoing work with epi toward implementing a comprehensive reform package for the qualifying examination. The results of the second edition of EPAC, held in October 2023 with over 300 candidates of 44 nationalities, will be published at the beginning of 2024 and the third edition will be organised in the second half of the year.

Clear guidelines

The 2024 **Guidelines for examination** will be published in February and enter into force in March. Language modernisation, including the extension of **gender-neutral language** to all official languages will remain a prominent theme in the revision cycle leading up to the 2025 Guidelines, which will begin with a public consultation in April. **Full transparency** will be maintained throughout the revision process, for example by publishing information on the basis and rationale for each change.

As the uptake of the **Unitary Patent (UP)** grows and the **Unified Patent Court (UPC)** ramps up its operations, the EPO will consolidate the integration of the UP system into its own processes. Practice and procedure will be further developed in response to UPC jurisprudence – especially decisions of its Court of Appeals – contributing to a shared vision of quality. The practice and procedures relating to UP tasks will be taken in the Guidelines. Further, the EPO will continue to work with the UPC and other stakeholders in spreading procedural knowledge and promoting further uptake of the system.

Strengthen the quality dialogue

Regular and constructive dialogue with our users will remain at the forefront of our pursuit of excellence in 2024. As the primary forum for discussion of quality, the Standing Advisory Committee before the EPO (**SACEPO**) and its Working Party on Quality will continue to meet in an expanded form and with increased frequency. Within the SACEPO framework, additional **Stakeholder Quality Assurance Panels (SQAP)** will be organised, and detailed outcomes will be published in the EPO's Quality Report in June 2024. Quality will likewise remain a standing topic in the EPO's frequent meetings with national, regional and industry-specific user associations.

Partner for accessibility

Accessibility through affordability

If endorsed by the Administrative Council, a **revised fee policy** would come into effect in April 2024 which will facilitate access to patent protection by under-represented stakeholders. The new fee structure will contain targeted measures to **support micro-entities**, complementing what is already in place for small and medium enterprises. The package will also contain a **simplification of fees** aimed to increase user-friendliness and incentivise digitalisation.

Accessibility through simple, convenient services

Following the successful implementation of a first basket of **legal changes supporting digitalisation and simplification** in November 2023, the EPO is pursuing further steps to make the patent grant procedure simpler and even better suited to the digital age. Developed in close consultation with users, the second basket will include measures to expand the use of electronic signatures, fully decommission fax as a means of filing, or improve handling of multimedia citations, among others. In addition, work will continue on further developing the **representatives' area** of the EPO website and extending the range of **self-service tools**.

Accessibility through European IT Co-operation

In 2024, we will continue with the implementation of **Front Office** in different member states, as well as extending the offer to our validation states, and continuing to add new features to cover most of the interactions between external users and national offices. **Ansera-based Search** will see an increase in the number of users as we will start offering access to our validation states. We will see a steady adoption of the new tool by all member states, aiming to decommission EpoqueNET by the end of 2025.

Accessibility through European and international co-operation

In 2023, we will continue to collaborate closely with the members of the European Patent Network (EPN) under the established co-operation framework: IT co-operation; co-operation projects to enhance knowledge and quality; cooperation projects aimed at work-sharing; and co-operation projects to promote the convergence of practices by patent offices. In full consultation with member states and the Technical and Operational Support Committee (TOSC), the catalogue of cooperation projects will be reviewed and revised, to define new projects for the future that are tailored to the diverse needs of our member states.

Building on the success of the **convergence of practice** programme in SP2023, a second cycle was launched in 2023. The two first topics in this cycle – allowable features in drawings

and electronic priority documents – will be concluded in 2024. Work will then begin on the following two: observations by third parties and practices concerning assignment. Internationally, we will continue to work with our global partners on **substantive patent law harmonisation**, with the aim to progress toward a common approach on aspects such as the grace period and prior user rights.

Also in the framework of the European Patent Network, the **Seconded National Expert** (SNE) programme will be further developed based on lessons learned and expanded up to a maximum of 70 SNEs across the Office, along with broadening the scope of hosting departments.

Validation extends the geographical scope of European patents to countries around the world, supporting international trade and investment, technology transfer and innovation, while reinforcing the EPO's position as the international patent office of choice for applicants with a global filing strategy. 2024 will begin with the entry into force of the validation agreement with Georgia in mid-January. Negotiations with Angola, Laos and "Organisation africaine de la propriété intellectuelle" (OAPI) are well advanced and could conclude in 2024. Ongoing efforts will also continue toward reaching an agreement with Costa Rica and Brunei. Technical co-operation will continue with all five validation offices (Morocco, Tunisia, Moldova, Cambodia and Georgia), as well as the 13 offices with whom we have a **reinforced partnership** in place.

As agreed by the Heads of Office of the **IP5** and **Trilateral**, the agenda for multilateral co-operation in 2024 will focus on sustainability, with new joint initiatives being articulated around the United Nations Sustainable Development Goals (UN SDGs). Special emphasis will be placed on SDG 4: Quality Education, which encompasses knowledge-sharing, technology transfer and youth-oriented IP awareness activities, to name a few.

Partner for impact

Partner for building awareness in new audiences

With a view to increasing awareness of innovation and IP among the younger generations, 22 European universities have recently introduced EPO courses into their curriculum in the context of the **Modular IP Education Framework** (MIPEF), which has ties to the Pan-European Seal Young Professional (PES YP) programme. Negotiations are underway for onboarding additional universities, with the aim to reach 50 in 2024. The Academy will also introduce innovation-related courses for students of the **European Schools** – including content on tackling innovation and climate change – as well as a new series of self-learning modules targeting youngsters.

Partner for skills and knowledge

Through the European Patent Academy, the EPO supports the national patent offices (NPOs) of its member states in building and maintaining the expertise of their staff; the courses in the **Training Catalogue 2024** have been co-created with the NPOs and are tailored to their needs. Joint training activities for EPO and NPO personnel will be extended in 2024, after a successful pilot in October 2023 demonstrated the synergies and efficiencies offered by this approach.

In the area of **patent litigation**, the EPO will continue to deliver training to professionals including national and UPC judges. In 2024, to accompany the development of new European patent jurisprudence, a new series will be offered on litigation before the UPC in co-operation with the major associations. To complement the annual European Judges' Forum, which takes place in the autumn, the Academy will launch a new Patent Litigation Matters event aimed at litigators.

Partner to provide leading patent intelligence

Espacenet now offers three **technology platforms** with public datasets on “fighting Coronavirus”, “clean energy” and “firefighting”. New platforms on relevant topics will be introduced in 2024, commencing with “fighting cancer” in the first quarter of the year. In partnership with European organisations, the EPO will also continue to publish **patent insight reports** analysing patenting trends on future and emerging technologies such as propulsion systems for space, quantum communication or advances in photovoltaics. We will also launch new initiatives to make patent information more accessible to the general public, including a full review of the patent knowledge products and services catalogue.

Partner for spreading patent intelligence

Work on **PATLIB** will continue in 2024 after successfully expanding and levelling up the European network through the PATLIB 2.0 project. The **Knowledge Transfer to Africa** (KT2A) initiative will conclude its pilot phase at the end of the year, with an expected 60 participating universities across the continent. The EPO will also hold its annual **Patent Knowledge Week** event in a revised, more interactive digital format, aimed at helping innovation professionals better bridge the gap between raw data and actionable insights.

Partner with other international organisations

As in previous years, the EPO will continue its close collaboration with **EU institutions** and agencies, defining new joint work programmes with European Union Intellectual Property Office (EUIPO) and the Community Plant Variety Office (CPVO) among others. Co-operation with **IP regional organisations in Africa** will focus on capacity building.

Partner for powerful dialogue and solutions: The Observatory

The EPO's **Observatory for Patents and Technology** serves to encourage knowledge sharing and foster evidence-driven discussions on a wide range of topics. Through pinpointing knowledge gaps in patents and intellectual property matters and bolstering understanding of intricate technological concepts, it aims at empowering the European Patent Network and its collaborators to address challenges, foresee transformations, and advance economic, social, and environmental progress. It will provide new opportunities to address specific stakeholder needs: policy makers and business leaders, for example, will benefit from enhanced patent data mapping and visualisation to support decision-making.

Awareness-raising campaigns to disseminate research, evidence, and patent-related intelligence will be carried out in co-operation with stakeholders at the European and national levels. The Observatory will also work closely with the Patent Academy and other actors to support **educational activities** and facilitate discussions on complex subjects. It will primarily operate as a **digital platform**, utilising modern communication tools such as online seminars and e-conferencing, and making the results of its work content freely available on the EPO website.

On 6 October 2023, the Observatory was launched officially. It was supported by the publication of its **biennial workplan**, built during the first semester 2023 through a comprehensive consultation process involving many stakeholders. The workplan – covering the period of 2023-2025 – includes ten main topics, including the contribution of innovation to the UN SDGs, climate change and energy crisis, space-related inventions, patenting activities in the health sector, and the latest technological trends among start-ups and SMEs.

On 17 October 2023, the Observatory held its first webinar dedicated to “**IP boosting startups**” which attracted more than 2 400 participants. During this event, a new tool was presented to the public: the **Deep Tech Finder**. Freely accessible, it blends data from a commercial business directory on over 7 500 of deep tech start-ups with information on their respective patent portfolios derived from the EPO's public patent databases. This helps investors or potential partners to find dynamic deep tech companies active in selected digital or clean energy technologies anywhere in Europe and to check their funding and the status of their patent application.

In 2024, the Observatory will implement its workplan built around seven main topics: cancer fighting technologies, climate change technologies, space related innovation, water technologies, energy transition, the financing of innovation and patent activities in European universities. **Collaboration** being pivotal to the Observatory's success, the participation of external stakeholders will be encouraged through calls for interest, consultations, and work packages. It will also develop **partnerships** with multiple actors of the innovation ecosystem to foster a better coordination of awareness activities and support measures, especially for research centres, universities, and start-ups. These activities will be supported

by **evidence-based material** such as the studies, analysis and statistics of the EPO Chief Economist Unit as well as the thematic Espacenet platforms.

Moreover, two new tools easily accessible from the EPO website and supporting the activities of the Observatory will be delivered in 2024:

- **the digital library:** a gateway to a growing wealth of critical analysis on technology and innovation, it will provide an easy access to all EPO published studies – some jointly with expert partners – on technologies, economics, patent data and IP law, as well as other publications published by our expert and stakeholder networks. Our resulting online inventory of the latest thinking, research and knowledge will make these valuable resources more accessible, whether for policy-making, academic investigations or news reporting. Moreover, think-tanks, universities, research centres, (inter-)governmental bodies and non-governmental organisations (NGOs) are constantly scrutinising how our IP system is used, as well as investigating trends in technological and economic development. Their valuable work helps generate insights and data on the forces and actors in our innovation ecosystem, from a variety of perspectives. In the coming months, the Observatory will conduct a **survey** of the many reports, studies and data produced by such third parties which are pertinent to our own activities and topics.
- **the data desk:** patent data provide a wealth of knowledge to be explored, especially on technology trends as illustrated by the **Patent Index**, whose 2023 edition is due to be launched in mid-March 2024. The data desk will offer improved visualisation using charts, tables, and dashboards, while increasing the transparency about the underlining methodologies used by the EPO. Such a data tool will enable the monitoring of the way in which different categories of entities and industries make use of the patent system, both at the European and the international level, the monitoring of innovation trends, spanning emerging technologies as well as ongoing technology transformation in broader industry sectors, the analysis of the activities, economic potential, and actual impact of innovation ecosystems.