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Review

Continuous Knowledge Transfer – A pragmatic approach to knowledge sharing in the European Patent Office

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ABSTRACT

During the last 15 years the European Patent Office (EPO) has established an internal peer to peer knowledge sharing process. This process is driven by a team of knowledge sharing experts, collated in a team called CKT – Continuous Knowledge Transfer. The process works in a complementary manner to classical and well-elaborated learning and development activities of the international organisation. The article aims at describing the motivation for creating such process, the development of CKT and its structure and tools. The basic components of the process are presented and success factors elaborated.

Contents

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1. Introduction

Out of a total of about 7000 staff, the European Patent Office (EPO) employs roughly 4300 patent examiners, which are recruited from among highly qualified engineers and scientists belonging to the 38 contracting states and thus have diverse cultural backgrounds. Many of these technical specialists have gained several years of scientific and professional experience before joining the Office. Examiners at the EPO need to master patent applications in the three official languages, English, French and German, and are confronted with complex patent law. Therefore, all examiners receive extensive in-house initial training in terms of patent law and procedures followed up by a variety of further learning modules throughout their professional carrier. A number of examiners follow this up by passing the European Qualifying examination.[1] The patent examination capacity of the EPO is distributed over three sites: Munich, The Hague and Berlin.

Examiners have to deal with a complex set of information-based procedures and associated supporting tools, all of which are continuously and rapidly evolving. Thus, patent examiners can be seen as knowledge workers *par excellence*, who on "non-routine" basis have to solve problems that require a combination of convergent, divergent and creative thinking [1].

These job characteristics, in combination with a business strategy of high staff retention and delivering high quality services efficiently, create strong organisational drivers for investing in a continuous learning and knowledge sharing environment.

The types of knowledge that a patent examiners are confronted with in order to perform their daily work can be categorized (see also Fig. 6) as

- technical (ranging from biotech and chemistry to computer science and telecom to classical engineering),
- legal (in particular substantive and procedural patent law),
- tools (to support patent granting procedures) and
- organisational ("who does what").

As service professionals and knowledge workers patent examiners have a strong interest in effectively and efficiently managing this wide variety of knowledge sources and inputs.

Of course, the EPO has a core competence in the management of technical knowledge *per se* contained in patent databases as well as scientific or technical prior art databases. In total these databases are closing in on one billion records.

The EPO, via its *Continuous Knowledge Transfer* (CKT) initiative, has developed knowledge transfer processes and corresponding IT infrastructure, going beyond this core competence. The main goal of the present work aims at describing how CKT supports examiners and other employees in all aspects of their daily work as well as in sharing good practice.

2. Learning, development and knowledge management

2.1. Background

In the last decades, Knowledge Management (KM) within organizations has received increased attention by scholars and management practitioners alike [2–7]. "Knowledge" and its management constitute abstract and complex intellectual concepts. It therefore comes as no surprise that a plethora of different meanings, approaches, descriptions, terminology and definitions have emerged and developed in this field.

Tiwana [8] developed a practical and result-oriented approach towards KM. He offers the following working definition: "Knowledge is a mix of framed experience, values, contextual information, expert insight and grounded intuition that provides an environment and framework for evaluating and incorporating new experiences and information. It originates and is applied in the minds of knowers. In organizations, it often becomes embedded not only in documents or repositories but also in organisational routines, processes, practices and norms."

In practical terms, many KM definitions and approaches revolve around the key theme of improving organisational effectiveness by helping workers best manage their knowledge [9].

Knowledge essentially originates in the minds of people and this pragmatic insight was and still is central in the CKT approach adopted in the EPO which is built around three pillars: people, tools and processes.

At the EPO, knowledge management has been developed as a complement to the already broad portfolio of classical training, learning and development (L&D) activities (e.g. class room courses, e-learning modules, coaching, etc). The EPO offers this wide range of internal learning activities and processes throughout all stages of the examiner's career and development (entry, intermediate, advanced, mastery) to help them adapt to new tasks, procedures and tools.

Moreover, initiatives such as the increased focus on Asian patent literature for prior art search and the introduction of rapidly developing concept based or natural language search tools have to be seen as drivers for the increased need in knowledge sharing. To

[1] The European Qualifying Examination (EQE) is a requirement to become European Patent Attorney. EQE consists of a pre-examination and four papers dedicated to specific situations in the professional life of a patent attorney, e.g. drafting a patent application or a notice of opposition.