IPI Academy

MANAGEMENT forum



*Presented by*
**Management Forum**

# Senior Patent Administrators Annual Update: European and International Patent Formalities

Stay ahead of global patent formalities changes with this essential training course update for senior patent administrators, covering EPO, WIPO, USPTO and Asia reforms, digitalisation, fee changes, compliance risk and practical implementation guidance

**Format:**
Bespoke training

**CPD:**
9 hours for your records (depending on your requirements)

Certificate of completion

# Course overview

**Patent formalities practice is evolving rapidly across Europe, the US and Asia.** Digitalisation initiatives, fee reforms, new tools and procedural changes are altering day-to-day workflows and compliance risk profiles. This training course delivers a structured, jurisdiction-by-jurisdiction update designed to ensure you remain technically accurate, operationally efficient and strategically prepared.

The training sessions combine expert-led analysis with practical discussion, equipping you with both the latest regulatory intelligence and clear implementation guidance.

This practical training course has been designed exclusively for patent administrators and IP formalities professionals, not for lawyers and attorneys. It covers latest information about EPO, WIPO, USPTO and Asia. As well as the latest tips and best practice you'll also hear about projected changes for the next year so you can get ahead of the game.

The expert speakers have first-hand practical experience and knowledge of their areas which they will share with you. There will also be plenty of time for discussion and for you to put your questions to the experts.

**Key topics include:**

**European patent procedure – What has changed and what's next?**

The training course opens with a comprehensive review of recent developments at the European Patent Office. You will examine:

- Updates to MyEPO Portfolio and the EPO's digitalisation roadmap
- End-to-end support for colour drawings at the EPO – what does this mean in practice?
- Micro-entity fee reductions and new validation states
- New electronic tools, including third party observations, electronic priority documents and Docx filing
- Fee increases effective 1 April 2026
- Forthcoming procedural changes expected in 2026/27

Crucially, each development is assessed through the lens of daily formalities practice — identifying workflow implications, risk areas, and practical adjustments required.

**The Unitary Patent – Operational and strategic considerations**

A focused training session on the Unitary Patent provides clarity on:

- The practical benefits of requesting unitary effect
- Filing requirements, including Form 7000
- Deadline management and re-establishment of rights
- Renewal fee structure and lifecycle considerations
- Supporting documentation, fees and procedural timings

This session translates legislative framework into actionable administrative guidance.

**PCT updates and national phase strategy**

This session focusses on international practice, covering:

- Recent PCT Rule amendments and practice developments
- Efficient use of ePCT for filing and post-filing management
- Best practice approaches during the international phase
- Structuring a smooth and compliant national phase entry

The session concludes with an extended Q&A, enabling delegates to test scenarios and resolve specific procedural uncertainties with the expert speakers.

**US prosecution: Fees, compliance and process efficiency**

US practice continues to evolve, particularly in fee structures and electronic procedures. This session covers:

- New USPTO fee developments, including the Earliest Benefit Date surcharge, IDS size fees, and DocX surcharge fee
- Expedited prosecution options
- DocuSign and electronic signature compliance

The focus is on minimising administrative risk while improving filing accuracy and process control.

**Patenting in China, Japan and Korea**

The final training session addresses formalities considerations in key Asian jurisdictions, with particular emphasis on China. Topics include:

- Patent and utility model protection in China, Japan and Korea
- Translation strategy and quality control tips for patenting in China, Japan and Korea
- The evolution of China's IP system and its role as an IP5 office
- Working effectively with local patent agents
- Navigating the CNIPA website and procedural framework
- Understanding examination proceedings stages and post-grant maintenance

Practical insight is provided to help delegates manage cross-border filings with greater confidence and fewer compliance issues.

This is not a theoretical overview. It is a detailed, practice-focused update designed for professionals responsible for managing patent formalities in a multi-jurisdictional environment.

Whether you are responsible for day-to-day filings or supervising a patent support function, this training course provides the procedural clarity and practical insight needed to operate with confidence in an evolving global patent environment.

## Who should attend?

This annual update training course has been specially designed for:

- Senior patent administrators
- Formalities officers
- IPR co-ordinators and legal assistants
- Paralegals
  Patent prosecution support staff
- IP operations and patent portfolio managers
- In-house IP professionals
- Practice managers and team leaders

All those looking for the latest information and formalities updates from leading experts and those who want to exchange views and ask questions about important patent formalities issues and challenges.

## Benefits of attending

By the end of this training course, you will:

- **Gain** a consolidated update on EPO, PCT, USPTO and key Asian procedural developments
- **Avoid** costly mistakes by understanding how recent rule and fee changes directly affect your daily formalities work
- **Future-proof** your processes with insight into expected 2026/27 procedural changes before they take effect
- **Master** new digital tools such as MyEPO Portfolio, ePCT and updated USPTO systems to streamline your workflow
- **Gain** practical clarity on the Unitary Patent - from filing requirements to renewal strategy and deadline management
- **Strengthen** your international filing strategy with proven best practices for both international and national phase procedures
- **Navigate** US and Asian prosecution with confidence, including new US fee structures and practical guidance for China, Japan and Korea
- **Achieve** clarity on your questions during interactive sessions and dedicated Q&As with experienced practitioners
- **Benchmark** your approach against peers and share solutions to common formalities challenges
- **Appreciate** how you can implement improvements immediately, saving time, reducing risk and improving efficiency

# Reviews

★★★★★

**Presentation was great.**

**Marina O'Neill**
Paralegal
Ponti & Partners, SLP
Sep 26 2024

★★★★★

**Very good! Definitely worth going! The speakers were awesome. I learned a lot about the latest developments in IP practice and was happy to meet other patent administrators from different countries. I was hoping to get more acquainted with US practices in particular, and I did thank to a very detailed presentation. The other presentations were also very interesting and instructive for me. I did not know much about the Unitary Patent but now I can say I do.**

**Karin Guignard**
Patent Assistant
Katzarov SA
Sep 26 2024

★★★★★

**This conference continues to be the most relevant and useful for patent administrators around the world.**

**Ole Martin Korsen**
Patent Administrator
Bryn Aarflot A/S
Sep 26 2024

★★★★★

**Overall the course content was interesting and full. I can use the slide decks for review and discussion. The presentations were engaging and enjoyable to listen to. All of the speakers were excellent.**

**Paul McBean**
Sr. Foreign Filing Specialist
Baker Donelson
Sep 26 2024

## Run this programme in-house for your whole team

Coming to IPI Academy for your in-house training provides an all-inclusive service which gives you access to a wide variety of content, learning platforms and delivery mechanisms as well as your own personal training adviser who will work with you from the initial enquiry through to feedback and follow-up after the programme.

With over 600 trainers, all practitioners and experts across a huge range of fields, we can provide the training you need, where you need it, when you need it, and at a price which suits your budget. Our approach to tailored learning and development consists of designing and delivering the appropriate solution for each client.

For your FREE consultation and to find out more about how we can work with you to solve your training needs, please contact our training advisers:



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IPI Academy

IPI Academy is a training initiative of Falconbury and Management Forum; leading providers of industry training for over 30 years, based in the UK.

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