

Scope

As part of the PATLIB2028 roadmap, the European Patent Office aims to increase the number of PATLIB centres that actively use the Technology Intelligence Platform (TIP) to support their regional innovation ecosystems. The objective is to help PATLIB staff offer more insightful advisory services by making it easier to explore and explain patent and innovation data without needing in-depth programming knowledge.

In order to achieve this goal, the following work package is commissioned.

Objectives of the assignment

The expert will design and deliver a combination of features, learning resources and training activities that:

- Make TIP easier to use for PATLIB staff with limited or no coding skills, enabling them to carry out regional, sectoral and comparative patent analyses independently.
- Provide ready-to-apply analytical use cases that reflect the needs and typical service situations of PATLIB centres.
- Equip PATLIB staff to confidently present and interpret TIP-based insights for their clients such as companies, researchers, entrepreneurs, regional authorities and innovation agencies.

The emphasis is on user experience, guidance and training.

Description of services

The services to be delivered by the expert relate to training of PATLIB staff and include:

1. Analytical use cases and practice scenarios
 - Draft a set of analytical use cases (notebooks) that mirror typical PATLIB activities (for example: comparing innovation activity between regions, trend analysing a technology field over time, benchmarking key applicants / competitors, or performing a multi-variable analysis, giving the user the possibility to include socioeconomic indicators to enable the exploration of possible correlations).
 - For each use case, provide step-by-step guidance, screenshots or example outputs, and tips on how to interpret and communicate the results to different audiences.
2. Educational material for using the tools and support texts
 - Set of ready-to-use prompts, predefined queries and explanatory texts that help PATLIB users explore and compare patent data in TIP without requiring advanced coding skills.
 - A handbook on how to configure these ready-to-use TIP prompts and queries, that bundles a coherent set of features, views and workflows, allowing PATLIBs to easily explore the power of TIP for regional, sectoral and comparative analysis
 - Provide documented steps and options for learning users to adapt key parameters (e.g. geography, technology field, time period) without programming.
 - Provide concise reference materials (slides, checklists, quick-reference guides) that PATLIB staff can use after the training for self-study and for internal cascaded training.
3. Deliver 20 hours of training activities for PATLIB staff
 - Two dedicated online or on-site training sessions on the use of TIP in PATLIB services, focusing on the designed use cases and guided workflows.
 - Participation in at least two PATLIB TIP working group meetings to collect feedback, demonstrate progress and refine the materials.

Expected outputs

By the end of the assignment, the following outputs are expected:

- A documented set of analytical use cases and practice scenarios, including step-by-step instructions and example outputs that PATLIBs can reuse and adapt in their daily work.
- Educational material for using the TIP tool and support learning resources (e.g. tutorials, quick guides), including ready-to-use prompts and queries combining features and guided workflows tailored to PATLIB needs, to support independent learning and continuous use of TIP tool by PATLIB centres in particular allowing them to perform regional, sectoral and comparative analyses without programming.
- Delivery of 20 hours of training activities in 2026 (two training sessions and participation in at least two TIP working group meetings), with participant feedback collected to inform future improvements and potential scaling of the approach within the PATLIB network.

Contribution to PATLIB2028

The assignment contributes to the PATLIB2028 goals and performance indicators, by increasing the number of PATLIB centres that actively apply TIP in their services and by raising the level of confidence and autonomy of PATLIB staff when working with patent data.