



OFFICE FOR HARMONIZATION IN THE INTERNAL MARKET
(TRADE MARKS AND DESIGNS)

COOPERATION FUND PROGRAMME SUPPORT OFFICE

PROJECT BRIEF

CF1.2.5 – Sharing and Harmonizing Quality Standards for Trademarks and Designs

Version 2.2 – 02/12/2010

Project/Service	COOPERATION FUND – QMD		
Status	FINAL		
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2.2	02/12/2010	SD	Updated working group information

Quality Criteria (to be used by reviewers)

Is the document clear and concise?

Is the scope of the project clearly defined?

Are the objectives of the project clearly identified?

Have the proposals of the interested Member States been taken account of?

TABLE OF CONTENTS

1.	PROJECT DEFINITION	5
1.1.	Introduction	5
1.1.1.	OHIM's QMS	5
1.2.	The Challenge	6
1.3.	Objectives	7
1.4.	Expected benefits	7
2.	PROJECT PLAN	8
2.1.	Project approach	8
2.1.1.	Overall approach	8
2.1.2.	Scope and exclusions	8
2.1.3.	Constraints	8
2.2.	Project team and stakeholders' organisation	8
2.2.1.	Roles and responsibilities	9
2.2.2.	Assignments	10
2.2.3.	Recruitment	11
2.3.	Work description	11
2.3.1.	Tasks and activities	11
2.3.2.	Major Deliverables and acceptance criteria	13
2.4.	Project planning tools	15
2.5.	Project timeplan	16
2.6.	Project costs estimates	17
2.6.1.	Project costs estimates	17
2.6.2.	Project effort estimates	17
2.7.	Project tolerances	17
2.8.	Risk analysis	18
2.9.	Key dependencies	18
2.10.	Project plan and schedule reporting procedure	19

2.11. Quality Management	20
2.11.1. Project delivery	21
2.11.2. Project management	22
2.12. Communications and knowledge management	22
2.13. Closing-out strategy	22
3. ANNEXES	24
3.1. Annex 1: definitions, acronyms and abbreviations	24
3.2. Annex 2: profiles	25
3.2.1. 26	
3.3. Annex 3: NOs' interest	29
3.4. Annex 4: OHIM QMS background	31
3.5. Annex 5: long-term vision	33

1. PROJECT DEFINITION

1.1. Introduction

The OHIM Cooperation Fund (CF) was established in February 2010 to support further harmonization in TMs and designs, modernise national offices, and enhance end-user experience Europe-wide.

The Fund's Management Board opened a period to receive project suggestions from NOs and user groups. These ideas were carefully examined and used as the basis for 23 projects. These projects are one-off activities delivering certain benefits, with concrete outputs and clear start and end dates.

Suggestions were called for under four headings:

- Harmonization projects.
- A suggested list of software packages (e-filing, e-opposition, e-cancellation, e-renewal and e-payment) to support NOs in providing electronic access to trade mark and design protection
- Information services comprising communication and training initiatives to help companies to better understand the CTM and RCD systems
- Activities to facilitate the enforcement of trade mark and design rights, helping the work of judges, customs and other relevant authorities.

All four having as common denominator the three principles of the CF:

- **Modernisation and user experience enhancement.** Modernising and streamlining National Office systems along common lines to provide effective and efficient e-services so that users experience a common feel and functionality.
- **Harmonization and user experience enhancement.** Identifying and supporting initiatives (especially where demonstrably collaborative) principally to encourage greater harmonization.
- **Enforcement.** Assisting the competent authorities in EU Member States to better promote and enforce trade mark and design rights.

A number of countries made several requests regarding quality, which in the end resulted in two different projects: CF1.2.5 Quality Standards and CF1.2.12 Quality Management System. The current project brief deals with the project regarding quality standards.

1.1.1. OHIM's QMS

OHIM started to develop a Quality Management System (QMS) in 2007*. One of the first results was the development of a *Service Charter* published on the OHIM website containing *service standards* to which the organisation was committed, and against which the OHIM Performance Management Unit (PMU) would report on a regular basis. Other key results were *processes mapped* in the area of quality checks, examination and registration processes. These process maps were published on the OHIM intranet to

* Documentation is available on OAMI-Online on the Quality Page (e.g. Quality Manual)

<http://oami.europa.eu/ows/rw/pages/QPLUS/QMS.en.do>. The full QMS, including process maps, is available on OHIM's Intranet (<http://qms/>).

ensure access to all staff of the office. In addition, Quality Officers were appointed in each department and intensive training of quality officers and managers took place.

After 3 years of the project, the main lessons learnt from OHIM QMS so far are that it has been a useful tool to:

- Commit towards users to a certain level of quality standard (timeliness, quality, accessibility)
- Measure performance against commitment
- Improve processes and performance
- Benchmark with partners
- Manage and share knowledge within the Office
- Train staff on new processes or new working methods
- Help transition to a IT tools
- Be ISO 9001 certified

Detailed information on OHIM's QMS background is available in [Annex 4](#).

1.2. The Challenge

A number of EU IP offices have started to introduce quality management in order to gain enhanced clarity and consistency in their service offering but this is still a new area for many.

A common move towards quality would help to achieve a common user experience in the EU independently of the office addressed. Carrying out this transition as a group will enable all to benefit from a knowledge exchange and best practice sharing between the different offices.

This move towards quality can be performed in different ways, and using different approaches. When Industrial Property National Offices (NOs) were asked during the Cooperation Fund gathering-requests process, their answers contained different perspectives and points of view regarding quality achievement. While some offices advocated for the implementation of a comprehensive EU quality management system, others asked just for best practice sharing in order to better design and implement their processes. Other offices asked for support in their quality certification or EFQM efforts, and others suggested defining some common key performance indicators to measure the services provided across the EU.

The CF Management Board consolidated these requests into two projects:

Harmonised Quality Standard for TMs and designs	
Programme ID:	CF1.2.5
Expected start:	4 Q 2010
Timeline	2010 – 2012
Principles	Best practice sharing and harmonisation of performance standards

[†] For more information on the OHIM's QMS background, please read Annex 2.

Description	This project aims to assist national offices by establishing common performance standards in areas such as accessibility of service, timeliness, and quality of decision in order to enhance their performance, achieving further harmonisation and comparability.
Harmonised Quality Management System for TMs and designs	
Programme ID:	CF1.2.12
Expected start:	3 Q 2011
Timeline	2011 – 2014
Principles	Best practice sharing and harmonisation of quality management practices
Description	This project aims to define and implement a harmonised quality management system (such as ISO 9001:2008 or EFQM Excellence) in order to improve efficiency and user experience.

Table 1 - Project Mandate

Several NOs have already shown interest in these two projects (see [Annex 3](#)). Since September there has been close contact with those offices interested in the project, which has provided key input to the scope and objectives of this project.

A Quality Management System identifies, defines and implements processes to improve efficiency and service. It is the basis on which performance can be measured and improvements can be made. This project brief will address only the objectives set out in the first project (CF 1.2.5).

1.3. Objectives

The main objective of the project is to define and agree a *common service charter* for participating EU IP offices, based on the measurement and comparison of key performance indicators.

In order to achieve this, a common set of *quality indicators and standards* will be defined, together with appropriate shared mapping methods in order to make sure that like is compared with like, and that enhanced service is delivered to end users.

1.4. Expected benefits

Overall, two major benefits can be derived from the realisation of this project:

- **Better service delivered to users.** Systematisation of processes will enable for lower error rates and faster processing times, meeting the most basic requirement expressed by user associations.
- **Operational improvements and efficiency gains in participating offices** POs have the opportunity to review and share their processes represented in a common manner and language. This allows comparison and analysis of possible improvements to reduce differences between National Offices. This lays the foundations to benefit from internal improvements and efficiency gains in the management of their TMs and Designs.

2. PROJECT PLAN

2.1. Project approach

2.1.1. Overall approach

The following three main work streams have been identified:

1. **Service Charter development and agreement** The Working Group, with advice from User Associations, will define and agree a charter of service standards based on key performance indicators.
2. **Defining a common methodology and set of tools** Participating Offices will provide their current processes and quality standards. A common methodology will be defined and agreed (e.g. terminology, templates, tools...) in order to carry forward the mapping of processes and gathering of information.
3. **Process mapping.** An analysis of the offices' processes will be carried out in order to make sure these standards are comparing like with like. The information gathered through the process above will provide valuable information on best practices and benchmark data.

There exists certain dependency between tasks, which will be detailed in the dependency section. However, the project will be planned in order to maximise the degree of parallel working.

2.1.2. Scope and exclusions

With regard to exclusions in the scope it is important to highlight the following ones:

- **Processes to be mapped.** This project will serve to map those processes that are directly linked to the defined services agreed on the common service charter. Therefore, the remaining processes will not be in the scope of this project.
- **Process redesign** This project will limit its scope to analyse current processes. Therefore, under the scope of this project there is no activity defined to improve or redesign current processes. However, this is not a stopper for those offices that want to change their processes after checking other offices' ones.

2.1.3. Constraints

At this stage the following possible constraints for the success of the project have been identified:

- **Consensus.** The mapping of processes requires a previous agreement on the tools and methodology to follow. Therefore, consensus is required among participants in the Quality Working Group.
- **Legal.** It may happen that the services / standards that apply in a country are not relevant for another, just because of differences in regulation. Therefore, standardisation may prove to be difficult if that is the case.

2.2. Project team and stakeholders' organisation

In order to carry out these activities, intensive interaction and coordination with POs is needed to gather different information, ideas, approaches, experiences, requirements, constraints and preferences.

Besides the intensive participation of POs, the project will also involve the participation of a project manager, the PSO and OHIM's QMS team of experts, supplemented with external resources as needed.

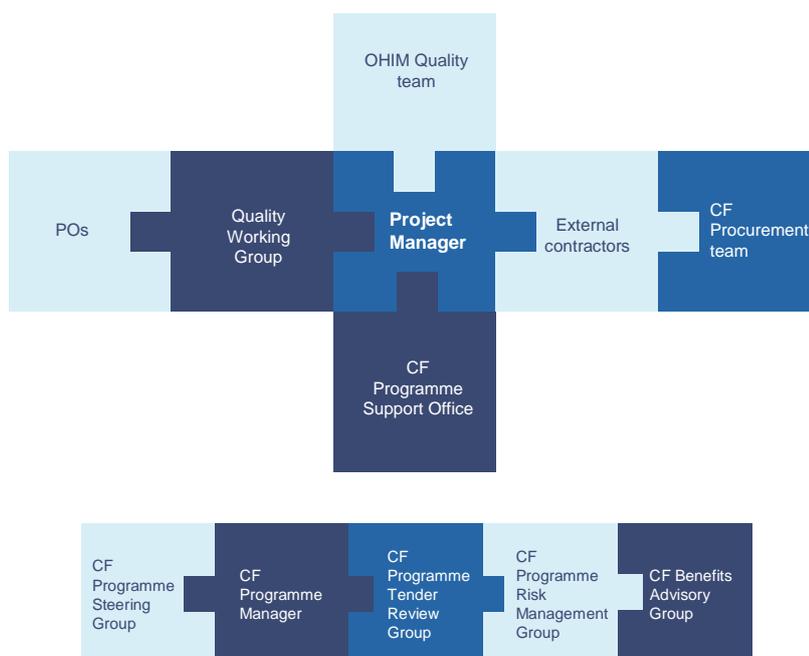


Figure 1 - Overview Project Team and Stakeholders

2.2.1. Roles and responsibilities

This table summarises the **key roles** involved in the project as well as their main responsibilities:

Roles	Responsibilities
Project Manager (PM)	<p>The PM is appointed by OHIM.</p> <p>The PM is authorised to lead the project on a day-to-day basis on behalf of the CF Management Board within the constraints laid down by the Board.</p> <p>The PM is responsible for the management of the lifecycle of the project and the quality of its products delivered within the specified constraints of time and cost.</p> <p>The PM plans, monitors and reports on the project to the Programme Manager.</p> <p>The PM produces project management documentation.</p> <p>The PM is responsible for presenting the project at the gate review process.</p> <p>The PM acts as a central point of communication.</p>
CF Programme Support Office	<p>The PSO supports the Programme Manager and Project Managers.</p> <p>It aids those involved in the project by provision of technical and administrative capacity, and quality assurance.</p>
External contractors	<p>This group will carry out many of the activities required to produce the deliverables. Analysis of documentation, mapping processes, interacting with the working group, IT tool selection and set-up or usability studies, are</p>

	<p>some of the activities that this group will perform.</p> <p>The group will be led by the Project Manager.</p>
Quality Working group	<p>This group will validate the global deliveries and will provide key input to certain activities (e.g. common service charter, common performance indicators...).</p> <p>It will be composed of representatives from interested Participating Offices and User Associations, with membership based on technical and business competence.</p>
The OHIM Quality team	The OHIM Quality team currently in charge of the evolution of OHIM QMS will provide expertise and experience, especially at the initial stages of the project.
POs responsible for quality	Participating Offices will provide information and comment on their processes or quality management procedures. The contribution of each Participant Office would be required: in the initial phase providing documentation or specific input needed; and in the final stage, with their feedback and adoption.

Apart from the main roles in the project, there will also be **other parties and stakeholders** involved in the project:

Roles	Responsibilities
CF Programme Steering Group	Ensuring that all internal OHIM issues are addressed by the Programme Manager.
CF Programme Manager	The Programme Manager is responsible to the CF Steering Group for the operations of the CF, overall planning, and leading the development and implementation of the project portfolio.
CF Programme Tender Review Group	Supporting the call for tender team, they will assure that tendering procedures across the CF are carried out efficiently, consistently and in accordance with best practice.
CF Programme Risk Management Group	<p>Established to:</p> <ul style="list-style-type: none"> ▪ recognise possible risk factors and identify related risks ▪ assess the potential impact of these risks for the programme ▪ select the adequate risk response and implement action plans ▪ monitor the status of the risks and keep stakeholders informed <p>They will be in close contact with the Project Manager, the CF Programme Manager and the CF PSO in order to identify and register any new risk that could arise along the duration of the project.</p>

2.2.2. Assignments

Role		Commitment (along the duration of the project: 13 months)
Project Manager	Claire Duranton	87 man days (30%)
Programme Support Office	Miguel Moro / Carolyne Vande Vorst / Sofie Declercq	14 man days (5%)

Role		Commitment (along the duration of the project: 13 months)
External contractors	IT specialist	100 man days (35%)
	Usability expert	50 man days (20%)
	Quality consultant	86 man days (30%)
	Business analyst (process and statistics engineer)	340 man days (120%)
Quality Working group	OHIM QMD member (TBD)	67 man days (25% if one person)
	5 quality experts belonging to 2 different PO (TBD)	24 man days per PO (9%)
The OHIM Quality team	OHIM ITD member (TBD)	4 man days (1.5%)
	OHIM QMD member (TBD)	Included above as part of the WG

2.2.3. Recruitment

The project will need a project team composed of external resources in the amount and for the profiles stated in the previous section. A provisional description of the different profiles can be found in **Annex 2**. The approach to recruit them will consist of the following steps:

- For each profile identify the OHIM's framework contract that covers the set of activities that it will carry out.
- Create the work-order which includes the formal request to the provider to submit its candidates' Curriculum Vitae.
- After careful examination of the CVs, interviews will take place to select the appropriate person. In addition, an English test will be organised for non-English natives to ensure a proficiency level of written and spoken English.
- A final selection of candidates will be made.

Finally, the project will require people from the offices for the working group. The profiles required will basically consist of people proficiency in English, with experience in quality management and models, and who also have a global picture of processes (for more details see **Annex 2**: Senior Quality Consultant). The project manager will follow a similar procedure to that of the external contractors: POs candidates' CVs will be requested, studied and selected based on the established criteria.

2.3. Work description

2.3.1. Tasks and activities

As stated above, three main work streams can be identified in the approach, with the first two running to some extent in parallel:

⇒ P01.2: service charter

A workgroup will define common service standards and a common charter of services reflecting performance in areas such as accessibility of service, timeliness, and quality of decisions. This will help to enhance performance, and achieve further harmonisation and comparability of the quality of service delivered. Moreover, the information will be published on the common platform open for sharing information, discussion and debate.

The main outputs for this phase will be:

- A comparative study of the participating offices as regards quality standards (timeliness, quality of decisions, accessibility), ISO 9001 and other quality related activities undertaken by National Offices.
- An analysis to achieve common quality standard
- A proposal for a common Service Charter
- Harmonised service standards and charter published in a shared website for those offices that are interested

⇒ **P01.1: establish methodology**

An analysis of the offices' processes will be carried out in order to make sure these standards are comparing like with like. For this purpose, the idea is to use a common and harmonised methodology and tools to develop the quality documentation. Therefore, in order to prepare the information for the analysis phase, the methodology and tools used to define and map the processes should be common. Then, it is important to create a set of standards to define and map. A standard will have to be defined to serve as basis to map processes which will serve as common "language" to draft all documentation needed.

The main outputs for this phase will be:

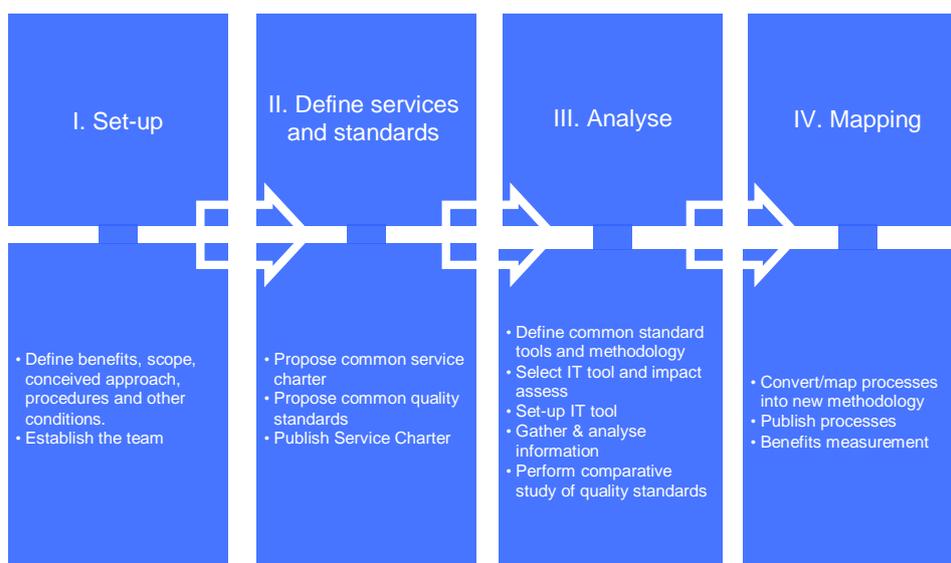
- One common and usable methodology to represent processes, as well as quality and performance standards. Guidelines drafted and validated.
- Collaborative tool selected, installed and administered.

⇒ **P01.3: process mapping**

Once the methodology and tools have been defined and agreed, those offices already ISO certified will have their data mapped and adapted to the common agreed standard methodology (transformed). Processes related to the service charter and performance indicators will be mapped using the defined standard methodology.

The main outputs for this phase will be:

- Converted processes to the agreed methodology to represent processes
- Published processes in a shared website



2.3.2. Major Deliverables and acceptance criteria

Deliverable	Acceptance Criteria	Responsibility	Man days	Estimated Date
Comparative study	Reviewed and validated by the WG, each PO should be able to have correct data about National Offices quality management status.	Project team and WG	EC:50	T0+2 months (first draft) T0+15 months (final version)
Common quality standards	Defined and agreed by the WG, the set of indicators chosen should be directly focused on the customer experience of service received	Project team and WG	EC:20	T0+2 months (first draft) T0+15 months (final version)
Common service charter	Defined and agreed by the WG, every PO should see their portfolio of services represented by the common list of services	Project team and WG	EC:20	T0+3 months (first draft) T0+15 months (final version)
Published service standards and service charter (usability study included)	Reviewed and validated by the WG	Project team and WG	EC:80	T0+6 months (first release) T0+14 months (final version)

Deliverable	Acceptance Criteria	Responsibility	Man days	Estimated Date
Standard guidelines (for mapping processes)	Defined and agreed by the WG, it should be assessed and selected based on usability and simplicity criteria	Project team and WG	EC*: 20	T0+3 months
IT tool (for mapping processes)	Selected and validated by the WG, it should follow the collaborative Web2.0 principles. In addition, the minimal configuration activities should have been performed (e.g. user accounts created, permissions organised, structure created, guidelines content uploaded).	Project team and WG	EC:40	T0+4 months
Converted/Mapped processes	Documentation should include flowcharts depicting the process. It should include the roles and activities performed, process choices and other major process decisions. Inputs, outputs and customers of the process all must be identified. Quality, customer satisfaction, throughput time, cost, errors, safety, or flexibility all should be included in tabulating the performance metrics. Reviewed and validated by the WG	Project team and WG	EC: 250	T0+13 months (first draft) T0+14 months (final version)
Published processes	Reviewed and validated by the WG	Project team and WG	EC: 30	T0+15 months
Project plan for a future common QMS	Reviewed and validated by the WG	Project team and WG	EC: 30	T0+23 months

Deliverable	Acceptance Criteria	Responsibility	Man days	Estimated Date

* G2: Gate 2 approval | EC: External contractor

2.4. Project planning tools

The project management tools will be Clarity, MSProject and Open Atrium (web 2.0 technologies to work in teams and discuss issues, share information, blog, and open cases and share meeting minutes).

2.5. Project timeplan

Quality Management System

Code	Description	T0+1				T0+2				T0+3				T0+4				T0+5				T0+6				T0+7				T0+8				T0+9				T0+10				T0+11				T0+12				T0+13				T0+14				T0+15			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4				
P00	Start-up																																																												
P00.1	Establish working group																																																												
P00.2	Kick-off meeting																																																												
P01	Development of PO's Quality Standards																																																												
P01.1	Defined and agreed common methodology and set of tools																																																												
P01.1.1	Selection of IT tool & impact assessed																																																												
P01.1.2	Set-up IT tool, configured																																																												
P01.1.3	Agreed process mapping methodology																																																												
P01.2	Global analysis																																																												
P01.2.1	Comparative study of current situation in national offices																																																												
P01.2.2	Proposed common Quality Standards																																																												
P01.2.3	Proposed common Service Charter																																																												
P01.2.4	Reviewed and validated																																																												
P01.2.5	Published Service Charter																																																												
P01.3	Analysis and delivery																																																												
P01.3.1	Information gathered																																																												
P01.3.2	Documentation analysed																																																												
P01.3.3	Processes mapped/transformed																																																												
P01.3.4	Reviewed and validated																																																												
P01.3.5	Published processes																																																												
P01.6	Procurement (Work orders + recruiting)																																																												

* Assuming 5 PO's: 3 already ISO certified (type1), 1 in a certification process (type2), and 1 without experience in quality certification (type 4). Only Type 4 offices will require a full mapping of processes. The rest will only require transformation/translation activities on their processes.

** Assuming an average of 20 processes (basically core business and other essential processes) to map/transform

*** Assuming 4 resources for the external contractors group and 5 participating offices in total (the 5 of them being members in the working group in addition to OHIM).

2.6. Project costs estimates³

2.6.1. Project costs estimates

The overall estimated cost for the Similarity project over 15 months is 485,122 €, which includes a 10% Management Reserve, 378,000 € for Studies and Consulting, 59,110 € for Non-IT Costs (working groups, meetings).

Based on the man days estimated in the deliverables section, the following cost categories can be identified:

- **External resources:**
 - 540 man days are planned for an External Provider, at the estimated daily rate of 700 € (based on the rates OHIM currently pays for similar technical profiles), totalling 378,000 €.
- **POs resources for Working Groups⁴:** the rate considered will be based on their specific actual cost of employment for the requested profiles. Since at this stage the different figures cannot be determined, an average estimated rate of 500 €/day has been applied. A total of 150 man days has been planned for a maximum of 5 POs in the Working Group totalling 75,000 €.
- **Meeting expenses⁵:** expenses have been calculated in accordance with current OHIM rules in force - Decision of the President ADM – 09-33 rev 2. Estimated total cost for up to 2 representatives from maximum 5 POs in the Quality Working Group totals 27,020 € for 2 meetings.

2.6.2. Project effort estimates

See in the **Annex** the effort overview tables per role.

OHIM internal staff effort is estimated at 150 man days over the duration of the project of which 50 days for the Project Manager, 90 days for the Project Team, 10 days for the Procurement.

540 man days are planned for an External Provider.

30 man days are planned for each PO in the working group. If 5 POs in the working group, this represents a total of 150 man days.

10 man days are planned for the CF Programme Management Support Team.

2.7. Project tolerances

The time and cost tolerances for the Cooperation Fund projects will be set by the Cooperation Fund Programme Support Office in collaboration with the Programme Steering Group as soon as the respective projects have been approved and will be the same for all Cooperation Fund Projects.

³ See Project Cost and Working Group Annexes for updated data 02/12/2010.

⁴ Idem

⁵ Idem

2.8. Risk analysis

This preliminary risk matrix is specific to the project and lists possible areas of risks. It is complementary to the “Cooperation Fund Programme Risk Matrix”:

Risk	Impact	Probability	P*I	Owner	Mitigation action
Too many PO candidates for the workgroup	Low	Low	Low	Project Manager	Use the defined selection criteria and explain clearly the reasons to those not selected.
Not enough PO candidates for the workgroup	Medium	Low	Low	Project Manager	Communicate well the benefits of participating in the project as member of the working group.
No active participation of members of the Working Group	High	Medium	High	Programme Owner	Clarify the procedures, rules and corrective actions since the very beginning in the start-up phase. Maintain spirit of teamwork, get diplomatic support from IAERD, express discontent openly, establish clear responsibilities
POs delays in sending information	High	Medium	Medium	Project manager	Ensure that the contact person is the right one. Send clear communications always including deadlines. Offer high level of flexibility to adapt to their schedules
Reluctance to share information	Medium	Medium	Medium	Programme and project manager	Communicate well and explain the long-term benefits that can be achieved by doing so.
Difficulties in reaching consensus	High	Medium	Medium	Project manager	Maintain spirit of teamwork, increase communication efforts, establish solid criteria, propose methodological approach
Working group with unaligned objectives	High	Low	Low	Project manager	Communicate well and try to assess the different opinions against the CF principles when in doubt.
More man-days from offices (POs or WG) needed	Medium	Medium	Medium	Project manager	Regular and effective planning monitoring and control to be performed by the project manager. When not in track, report to the Programme Manager.

2.9. Key dependencies

The “Harmonised Quality Standards” project has dependencies with other projects scheduled in the house. These dependencies have been classified depending on the nature of the dependency (Synergy (S), Overlap (O) or Dependency (D)) and are summarised as follows:

Project	Type			Impact	Description
	D	S	O		
Project ID CF1.2.6 Harmonised forecasting methodology		•		Medium	Project 1.2.6 will use information in processes as an input to develop their model. This project could serve as a valuable source of information helping to reduce the work to be done.

Project	Type			Impact	Description
	D	S	O		
Project ID CF1.2.7 Harmonised user satisfaction survey		•		High	The common performance standards that will come out of this project constitute essential input to the harmonised survey.
Project ID 1.2.10 Common examiner support tool		•		Low	To achieve a smooth integration of the CESTO tool, it is important to consider the process that the examiners follow when doing their work.
Project ID 1.2.11 Common portal for applications		•		Low	It may be decided that the common portal hosts the content that results from this project.
Project ID CF1.2.12 Quality Management System	•			High	The quality management system will benefit substantially from the information created in this project.. The Quality management system identifies, defines and implements processes to improve efficiency and service.
Project ID 2.13 TM-XML standard extension and architecture definition	•			Low	Under the scope of this project there is the definition of a catalogue of services of the POs. Some of the information in this regard is being collected by project 2.13.
Project ID 2.14-19 Software package (SW)	•			Very high	The SW package project will find highly valuable the AS-IS information produced in this project. It could help the Sw-package team to define the TO-BE model
Project ID CF3.20 Common e-learning tool		•		Medium	Processes, services and indicators are all pieces of information which qualify as content in the new e-learning tool.
Project ID CF3.21 Common call centre tool		•		Low	Processes, services and indicators are all pieces of information which qualify as content for the common call centre (common set of standardised responses).

This information is of crucial value to establish the right coordination actions and communication plan for the project.

2.10. Project plan and schedule reporting procedure

As set out in the Programme Operating Rules agreed by all internal parties involved in the CF:

- The Project Manager will report to the PSO

- Project managers create, maintain and update the following minimal documents for their projects:
 - **Project plan** and **schedule** (including breakdown tasks, costs, time and resources). It will include tracking information (actual and planned) in a visual manner.
 - A **risk register** and, if appropriate, the suggested contingency plans.
 - A **stakeholder engagement and communications plan**
- The documents will be reported upon using a standard template (see Programme Operating Rules)
- The documents shall be kept as light as possible but the PM retains the authority to define their content and set the reporting schedule. Initially a meeting with the PSO will be set up on a fortnightly basis.
- Project Managers are responsible for preparing the content for a Gate Review. PSO will support them in the process.

As well as the Project Manager-PSO interactions, the PSO will also hold independent **monthly meetings** with the Risk Group, the Tender Review Group and the PSG respectively. In each meeting the PSO will report them on the status of the project and will bring up any topic under their fieldwork that needs either further discussion or their validation.

TASK/RESPONSIBILITY MATRIX			
Task	Recurrence	Assigned role	Responsibilities
Regular reporting	Monthly; updates weekly via Clarity tool	Project Manager	Monthly reporting to the PSO: project plan, risk register and communications plan
Gate review management	Undefined	Project Manager	Documentation for the Gate Review process
Reporting to Risk Group	Every 6-weeks	PSO	Update on the latest status and issues to discuss
Reporting to Tender Review Group	Regularly (By exception)	PSO	Update on the latest status and issues to discuss
Reporting to Programme Steering Group	Monthly	Programme Manager	Update on the latest status and issues to discuss

2.11. Quality Management

The following sections describe the quality management activities planned for the different work streams. In all cases, the Programme Manager reserves the right to request a quality check on delivered results, using PSO resources distinct from the project budget.

2.11.1. Project delivery

Once the project starts and the requirements are being further specified by the working group and the POs, the *quality plan* will be prepared by the project manager. This will set out the standards relevant for the project, as well as the different quality activities to be carried out during the project. This will include a short description of each quality activity, its type, timing, relevant responsible persons and other relevant information. An example entry is shown as follows:

Activity	Quality type	Approach	Review time	Sign-off responsible	Acceptance criteria
Check issue management process	QA	Check Clarity, check Alfresco and issue log	15/12/2012	TBC	Up to date relevant data should be stored

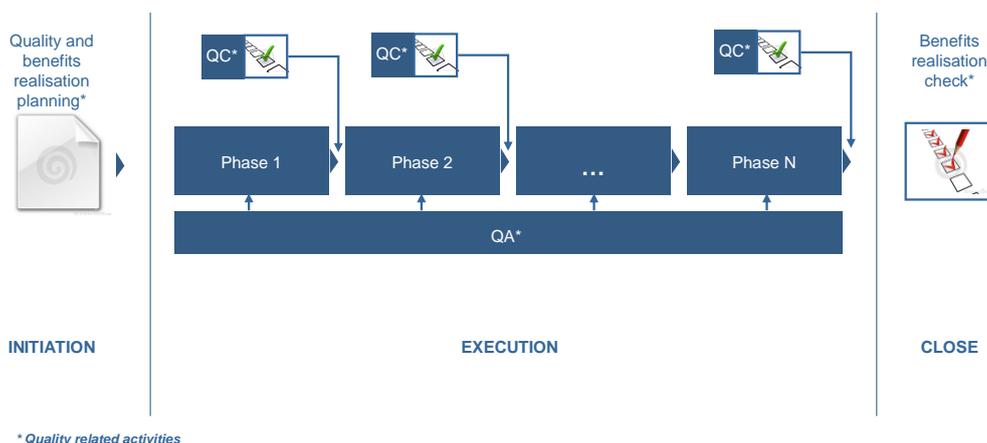
The quality plan will cover both *quality assurance* and *quality control*. That is, the quality of both the processes followed (e.g. System Life Cycle development) and the quality of the deliverables (e.g. functional design) will be verified against applicable standards.

In order to minimise bureaucracy, the project will apply the existing quality procedures followed by the Office.

As for this project, deliverables will have to comply with the acceptance criteria established in the deliverables section (**2.3 Major deliverables**). The acceptance criteria for each deliverable have been described at the *process* level. This is because the lack of detailed requirements at this stage (in fact requirements will be fully detailed in the gathering requirements phase) make it difficult to describe the acceptance criteria at the *detail* level. The *process* level specifies high level criteria as well as the formal approval process that the deliverable should follow for its validation and sign-off. The project manager will ensure that the approval process is followed for each deliverable of the project. Moreover, the internal *OHIM-Audit team* could at any time provide additional QA measures (e.g. repeating the QC procedures, checking the qualifications of staff involved, checking procedures for project file maintenance, reviewing organizational functions and knowledge of procedures...).

During the closeout phase of the project, a formal process will take place in which the benefits realisation plan of the project will be reviewed taking into account the quality expectations defined in the quality plan.

These three perspectives for dealing with quality (**quality assurance**, **quality control** and **benefits realisation**) will maximize the chances of success for the project.



Three perspectives on quality: QC, QA and benefits realisation

2.11.2. Project management

Apart from having a quality approach to deal with project deliverables, the project will also follow certain rules with regard to project-management related processes and deliverables.

Namely, the project will follow all the processes defined and established by the CF-PSO to handle project-management *activities* (e.g. issue management, change management, risk management, reporting...). Moreover, the content and format of each project-management *deliverable* (e.g. issue log, quality log...) will be in compliance with CF-PSO templates and rules.

2.12. Communications and knowledge management

Communication with POs and Working Group will take place primarily through the IT collaborative tool Open Atrium. All information will be available online (Open Atrium) so all members of the working group could see in real time all the information related to the project.

Knowledge management will be partly handled by Open Atrium and tools provided by either the Programme Support Office or OHIM (e.g. ShareIPWiki).

A communication plan and knowledge management plan will be developed when the project starts.

2.13. Closing-out strategy

Once the main deliverables have been completed, all relevant payments made, and the sustainability requirements identified, the Project Manager will present the project's results to the Management Board, which will identify main **lessons learned** at the programme level, direct the Programme Manager accordingly and close out the project.

The deliverables in this project will leave a legacy for the participating offices and also for other offices that would be thinking of joining in the future. The information created can be grouped into two separated areas: the common EU part (service charter and quality standards) and the country-specific one (mapped processes). Both pieces of information are not static. Moreover, processes and standards are in fact defined and documented with the intention to be improved gradually with everyone's input. However, after this project finishes, the responsibility to apply changes will have to be performed out of the scope of this project.

Several schemes may be decided to maintain alive and up to date the quality information resulting from this project, but EU IP offices will surely benefit from the continuation of the Quality working group. In fact, it is recommended that project CF1.2.12 Common Quality Management System makes use of the working group established in this project. The Benefits Advisory Group, consisting of the Programme Manager, Project Manager and Key Benefits Manager, will therefore meet at least three months before the end of the project to determine medium-term sustainability requirements and appropriate actions.

As for the maintenance of the shared website that stores the information on quality, a period for deciding the next-steps approach will be opened before this project comes to its end. An assessment as regards the implications of cloud hosting and commercial software licensing for this project will be discussed, including alternatives (based on likely future operational needs) to reduce operating costs after project delivery.

3. ANNEXES

3.1. Annex 1: definitions, acronyms and abbreviations

The following table describes the different acronyms or abbreviations used throughout the document:

Abbreviation	Description
CF	Cooperation Fund
EC	External contractor
EFQM	European Foundation for Quality Management
EU	European Union
IP	Intellectual property
ISO	International Organisation for Standardisation
ITD	OHIM Information Technologies Department
MB	Management Board
NO	National Office
PM	Project Manager
PMU	OHIM Performance Measurement Unit
PO	Participating Office
PSG	Programme Steering Group
PSO	CF Programme Support Office
QMD	OHIM Quality Management Department
QMS	Quality Management System
T0	Time of start of the project
TM	Trademark
WG	Working group

3.2. Annex 2: profiles

Senior Quality Consultant

Nature of the tasks	<ul style="list-style-type: none"> • Create awareness, promote and implement common quality standards. • Development of all activities related to establishing common quality standards: one common and usable methodology to represent processes, quality and performance standards; methodology guidelines drafted and validated; process mapping, process mapping support, process reviews, linking performance indicators to processes, measuring processes. • Analyzing and drafting documents (e.g. comparative study of all IP Offices, feasibility analysis for ISO 9001 and EFQM) and other quality documents. • Coaching on quality management (e.g. ISO 9001, EFQM). Training on process mapping methodology and reviewing of processes. • Assist with methodologies such as Lean thinking. Consultancy studies on quality matters.
Knowledge and skills	<ul style="list-style-type: none"> • Ability to speak, write and read fluently in English. • Ability to participate in multi-lingual meetings. • Good communicator at all levels. Strategic thinker. • Experience of integration in an international/multi-cultural environment, rapid self-starting capability and experience in team working are mandatory. • Experience of applying formal quality standards. • Quality management, quality models, quality assurance (ISO standards, Lean Methodology, guidelines and references of other organizations, etc.). • Experience in carrying out high-level management studies. • Quality assurance of projects in the relevant subject.
Education and Experience	<ul style="list-style-type: none"> • University degree, in a relevant subject. • Minimum 15 years in Quality Management. • Minimum 5 years experience in establishing a Quality Management System

IT specialist

Nature of the tasks	<ul style="list-style-type: none"> • Provide IT technical consultancy, expertise and evaluations in a specific technical domain regarding the relevant subject. • Provide IT technical expertise in the relevant subject. • Set-up IT tools chosen for team work (e.g. Open Atrium). • Set-up IT platform to map, up-date processes and share performance standards collaboratively between National Offices and OHIM. • Maintain IT tools, administer them. Publish documents (e.g. processes and standards) • Give presentations on technical key aspects of the relevant subject.
Knowledge and skills	<ul style="list-style-type: none"> • In depth knowledge in IT technical consulting matters • Ability to speak, write and read fluently in English and another language. • Strong capacity in preparing and writing IT technical consultancy documents. • Strong capacity to advise on selection of IT tools, install, set-up and administer an IT tool. • Strong capacity to train staff on IT tools selected for the project. • Strong capacity to give high level presentations. • Ability to apply high quality standards • Ability to participate in multi-lingual meetings. • Good communicator at all levels. • Capability of working in an international/ multicultural environment
Education and Experience	<ul style="list-style-type: none"> • Minimum 5 years experience in the relevant subject. • Minimum 5 years experience in technical consulting relevant to the requested subject. • Proven experience with quality procedures.

3.2.1.

Engineer in processes and statistics

Nature of the tasks	<ul style="list-style-type: none">• Help to set up process mapping and measuring methodology for the future Common QMS• Support Senior Quality Consultant in defining context diagrams and process maps• Propose tools and solutions (e.g. to publish process performance)• Map processes and context diagrams• Analyse quality standards and connect them to maps and context diagrams• Publish processes with statistics
Knowledge and skills	<ul style="list-style-type: none">• Extensive knowledge of process and statistics methods• Demonstrated ability to work in a team and with a variety of actors• Desire to achieve innovation• Ability to speak, write and read fluently in English.• Ability to apply high quality standards.• Excellent communicator at all levels.• Capability of working in an international/ multicultural environment.• Ability to lead and moderate multi-lingual meetings.• Strong capacity to give high level presentations.• Strong capacity in preparing and writing documents and reports.• Excellent interpersonal skills. Adaptable, results oriented, able to work under pressure whilst maintaining attention to detail with excellent organisational skills.• Six Sigma certified to a black belt level
Education and Experience	<ul style="list-style-type: none">• University degree, in a relevant subject.• Minimum 10 years in the relevant subject.• Minimum 5 years experience dedicated to process & statistics

Usability expert

Nature of the tasks	<ul style="list-style-type: none">• Organize, set up and execute studies using the following usability techniques: Focus Group, User Testing, Observational Analysis, Prototyping, Heuristic Evaluation and preparation of Style Guides on site and off site.• Work collaboratively to achieve high quality user experiences on complex process features• Provide expert reviews as needed• Evangelize best practices for achieving User Centered Design• Guide the creation and adoption of new process mapping and quality standards methods and tools
Knowledge and skills	<ul style="list-style-type: none">• Extensive knowledge of usability methods• Demonstrated ability to balance multiple projects at once• Desire to achieve innovation• Ability to speak, write and read fluently in English.• Ability to apply high quality standards.• Excellent communicator at all levels.• Capability of working in an international/ multicultural environment.• Ability to lead and moderate multi-lingual meetings.• Strong capacity to give high level presentations.• Strong capacity in preparing and writing documents and reports.• Diplomatic.• Excellent interpersonal skills.
Education and Experience	<ul style="list-style-type: none">• University degree, in a relevant subject.• Minimum 10 years in the relevant subject.• Minimum 5 years experience dedicated to usability.

3.3. Annex 3: NOs' interest

Responses of National Offices to the email sent on 5/08/2010 regarding input on scope and objectives for the two projects: CF 1.2.5 Harmonised Quality Standard for TMs and Designs. CF 1.2.12 Harmonised Quality Management System for TMs and Designs.

Offices	Interest?	Quotation from expression of interest	Contact person in this IP National Office
Spain	High	“[...] we should learn from EPO. NPTOs and OHIM's experience is very valuable too, especially implementation of a quality management system, including internal and external audits, documentation control tools.	Gerardo Penas Marta Cortés and Pablo Gómez
Denmark	High	“[...] Regarding the projects I believe they are both very important and I look forward to participating and working together on the projects. I think that a common Quality Management System will enhance harmonization, since it gives all National Offices and OHIM a unique opportunity to benchmark on key performance indicators regarding quality. It also adds transparency to the system as a whole, which is a major benefit for users of the European trademark systems. The same goes for harmonized quality standards where possible. I also believe that there is a distinct need for the use and documentation which is provided by a Quality Management System. It can be used as a tool for National Offices and OHIM to ensure consistency, quality and harmonization, so that users are able to rely on all decisions and working procedures being followed and handled in the same manner. Working with the same QMS therefore results in the possibility to compare output and quality. The following points might be taken into consideration 1. Existing and available guidelines and manuals 2. IT 3. Awareness and knowledge regarding QMS 4. Management ambition and interest “[...]”	Lone Frosch
Bulgaria	Yes	Wants to participate in both projects. [...] With regard to your last communication with my colleague Ms. Nikolova dated 17 August 2010, I would like to inform you that the Patent Office of the Republic of Bulgaria is very much interested in taking part in both "Quality Standards" and "Quality Management System" Projects of the Programme of the Cooperation Fund. In order to provide you with ideas on the scope and objectives of the Projects we would need some additional time to look into details OHIM's Quality Standards and Quality Management System. [...]	Romina Petrova

		Please be informed that I will deal with both Projects (as a contact person).	
Czech	Yes	[...] looking forward for further cooperation.	Jan Mrva
Hungary	Yes	Hungary gives an overview of the status of their progress for ISO 9001 and IMS. HPO is interested in receiving financial support: [...] "It is without saying that the implementation procedure creates burdens for the Office in terms of finance and human resources, therefore it would be very helpful for us to receive financial support in order to cover the cost of the external consulting company and some further expenditure in this regard." [...]	Imre Gonda
Lithuania	For later stages	[...]At the moment we would prefer not to be active players and rather to follow the ongoing discussion on CF projects aims and scope. As we indicated in our letter of 23 June, 2010, we are ready to participate in the later stage of the projects. We are sure these projects will be useful for national trademark offices, wishing to adopt or modify their quality standards and quality management systems. [...]	Arunas Zelvys
Italy	For later stages	[...]At this regard I must say that although we are very much interested in the projects you manage, for the moment we are dealing with another priority goal (the back- log elimination) that involves us completely, until the end of this year. Nevertheless, as we are on line in the examination of the TM we are willing to join your project, as the quality is the other most important goal we want to reach. Please consider the possibility that we join this project in a second time and let me know. [...]	Stefania Benincasa
Benelux	For later stages	[...]As it is mentioned in the interests expressed by the national offices, we at Benelux think it can be interesting but is not a priority for us. We do not intend to participate actively in that project in an early stage. [...]	Jean-Marie Putz
Romania	For later stages	[...] Scarce human resources did not allow them to give input to project scope and objectives. [...]	Ovidiu Dinescu

3.4. Annex 4: OHIM QMS background

The Quality Management initiative to establish a quality management system (QMS) for the OHIM started in the summer of 2006. The initial emphasis was to produce a Quality Manual that set out a vision for the QMS, and to gain the approval of the Management Committee (MC) for that Manual; this was achieved in the autumn of 2006. At the same time, a core QMS Project Team was established, and a consultation started with all the departments for the nomination of their Quality Officers. The objective was to establish a systematic approach to quality, in all departments of the Office.

In 2007 the architecture of the QMS was agreed, guidance for process mapping was produced, and training was provided to Quality Officers, Business Analysts, and others. The Service Charter was developed and published on the OHIM website containing service standards to which the organisation was committed, and against which the Performance Management Unit (PMU) would report on a regular basis. Based on collaboration by Quality Officers and the QMS Project Team, work started to produce process maps for all Core Business activities.

During 2007 an extensive Quality Management training programme comprising five modules, each of three days, was provided to Quality Officers and other interested individuals. This included a benchmarking visit to EUROCONTROL, another European agency that has implemented a QMS, which produced a number of improvements that have been realised for the OHIM. A presentation of the result of training and QMS work was made to the Management Committee by all Quality Officers in February 2008.

In February 2008, the Management Committee of the Office decided on the Quality Management System Priorities. These consisted of helping the transition to EM++ (the new workflow tool and database at OHIM), reaching ISO 9001 for Designs, promoting continuous improvement, and providing content to the Knowledge Management Project, identifying, defining and implementing horizontal management processes, and integrating support processes into the QMS upon the request of Process Owners⁶.

During 2008 work was concentrated initially on completing the process cards for Core Business activities, extending into some supporting activities, and starting to prepare for ISO 9001 certification of Designs processing. Between March and September a varied mixture of Core Business and supporting processes, including horizontal processes such as those for Business Change, were published in five QMS releases. Towards the end of 2008 the QMS Project Team was working closely with Key-Users of the new Euromarc++ (EM++) system to develop new process cards. These were intended to support the training of all trade mark examiners to prepare for the new working practices and the new system. It became clear that the scope of the EM++ processes was much wider than initially estimated. As a consequence all other QMS work was suspended so that the Team could focus on EM++. The initial set of process cards was released in December, ready for training.

The QMS Team supported the EM++ training activity in early 2009 and, with the collaboration of the Quality Officers and Key-Users, released an updated set of process cards ready for Go-live in February. Processes were presented in a total of 108 EM++ training sessions. Since then a number of Core Business and support processes, including horizontal processes, were published to the QMS in a

⁶ and subject to QMS Project Team resource constraints⁶

further eight releases. Work resumed preparing the OHIM for certification to ISO 9001 for Designs processing.

Det Norske Veritas was contracted as the ISO 9001 certification body, and at an initial meeting in July, provisional assessment dates were agreed for 24 November and 14 and 15 December. In June, the OHIM underwent a reorganisation which had significant impacts on the QMS, involving changes to departmental structures and names, changes in process ownership, and changes in Quality Officers.

Intensive preparation took place between September and November. On 24th November, the ISO 9001 audit took place and no non-conformities were found by the auditors. This resulted in a successful ISO 9001 certification.

Several presentations of the OHIM QMS were made during the Liaison Meetings of 2009 and 2010. OHIM QMS is seen by many POs as a reference in terms of mapping processes and communicating them effectively.

3.5. Annex 5: long-term vision

Vision: “Sharing and Harmonising Quality Standards and Harmonised Quality Management System for TMs and Designs.”

The CF Field 1.5 and 1.5.12 projects will result in a Common Quality Management System (QMS) which will be ISO 9001 certified and/or to the EFQM level. In the first place, we will have one Common Service Charter compiling the information of all offices on their service standard (e.g. time, quality, accessibility, user satisfaction). This will help to share information on quality standards. A new page on OAMI-Online will publish all the service standards of the participating Offices (POs).

Once enough information is shared and made accessible through OAMI-Online, a process of discussion will take place to analyse how to harmonise quality standards and establish common standards. This soft but steady harmonisation will allow establishing systematic mechanisms to reach and maintain a common level of excellence that fully meets users' needs and expectations.

The Common Service Charter will include agreed common standards by National Offices. It will provide useful information when future cooperation fund projects have to be selected. Offices with lower performance levels will benefit from the solidarity of the Cooperation Fund to support their efforts in performance improvement and improved service to users.

The Common Quality Management System will also describe each National Office's processes as well as OHIM processes. It will highlight the differences between National Offices and between National Offices and OHIM. To optimize the functioning of the trade mark and designs system across the EU, it is necessary to know what the current status quo is. This is what is achieved through a Quality Management System (collection of processes reflecting each National Office at a point of time). Having this picture will enable an understanding of each Office's particularities. It will facilitate the implementation of future services such as e-filing, e-opposition etc. Today this picture is not available anywhere.

The Common Quality Management System will be a paperless system. All processes and information will be published on an IT Platform, using web 2.0 technology and accessible through OAMI-Online. Using this technology will allow each user (e.g. OHIM and National Offices) to update or comment upon the information at any point in time. It will be a collaborative tool, which each National Office can use to share information and discuss topics of interest (e.g. through blogs, case tracker, meetings actions). Benefits of the tool include being able to show all exchanges of information; this is not currently possible. Communication with National Offices takes place through emails and information is blocked in emails although it could be useful to the Community of National Offices and OHIM. This IT platform will offer what emails fail to offer: real exchanges and discussions online, sharing of information, comparing information. It will improve significantly collaboration for further harmonisation work. It will be the key success factor for the common QMS as it will be the only source of reference. When the collection of knowledge through processes and measurements is mature enough, it will be open and made accessible to the world through publication on OAMI-Online (via a portal). It will increase transparency and provide information to the community of users who need information on how National Offices operate and perform. Ultimately, sharing information and being able to compare will automatically create the pressure needed to improve, modernise and streamline systems (both OHIM and National Offices' systems).

The common QMS will include processes performed by National Offices (such as registering a TM or Design, managing user queries, surveying user satisfaction, analysing complaints, improving

processes). It will additionally develop common processes for managing user satisfaction and calls in a harmonised manner. The common processes will be the key success factor for the Cooperation Fund. Delivering common databases is not enough; harmonisation is about eliminating differences in practices to improve user experience. Only common processes can deliver this through sharing common methods. In the end, the common processes developed for the Common Quality Management System will support the implementation of the EU Directive for harmonisation of trade marks and designs registration by delivering a common way of working in IP Offices registering trade marks and designs.

A Common Quality Management System will also include sharing common guidelines, manuals, practices. It will be a useful training tool.

Last but not least, the two projects will facilitate the transition to the new software as it will describe the processes of National Offices in a systematic way (e.g. process maps). Delivering software by ensuring that it takes into account National Offices current processes is a critical success factor for a software package. Re-engineering processes can only be done if you have a current picture of the process. Proposing a new software includes taking account of current services given by National Offices.

Knowing the processes of each National Office interested in the software package is key to ensure the success of the future software package planned in the Cooperation Fund list of projects. Process knowledge will also allow National Offices and OHIM to impact assess whether or not the future software package can be adopted.

ANNEX : PROJECT COSTS

1.2.5 QUALITY STANDARDS (15 months)

1. OVERALL COSTS PER DEPARTMENT (in EUR)

	Grand Total
IAERD	107.112
QMD	378.000
Grand Total	485.112

2. OVERALL COSTS PER COST CATEGORY (in EUR)

	Grand Total
Non-IT Project Costs	437.110
Meetings	13.510
Accommodation	3.750
Allowance	2.760
Travel	7.000
Studies & Consulting	378.000
Working Group	45.600
Management Reserve	48.002
Grand Total	485.112

3. COSTS PER DEPARTMENT 2011 (in EUR)

	Grand Total
IAERD	59.110
QMD	378.000
Grand Total	437.110

4. COSTS PER COST CATEGORY FOR 2011 (in EUR)

	Grand Total
Non-IT Project Costs	437.110
Meetings	13.510
Accommodation	3.750
Allowance	2.760
Travel	7.000
Studies & Consulting	378.000
Working Group	45.600
Grand Total	437.110

ANNEX : PROJECT EFFORT

1.2.5 QUALITY STANDARDS (15 months)

1. OVERALL EFFORT (in MANDAYS)

	Grand Total
OHIM External	540
External Provider	540
OHIM Staff	200
Procurement Team	10
Project Manager	100
Project Team	90
PO	150
Working Group	150
PSO	10
PSO	10
Grand Total	900

2. EFFORT IN 2011 (in MANDAYS)

	Grand Total
OHIM External	540
External Provider	540
OHIM Staff	150
Procurement Team	10
Project Manager	50
Project Team	90
PO	150
Working Group	150
PSO	10
PSO	10
Grand Total	850



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COOPERATION FUND PROJECTS

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