



30 November 2023

Dear **epi** Member,

The financial operation of **epi** has faced significant challenges in recent years, yet we have been able to navigate through them with the help of our accumulated reserves. In 2022, as **epi**'s activities partially returned to normal level we faced a year-end loss of approximately EUR 200k followed by an estimated loss for 2023 of around EUR 530k and - despite of a cautious budget planning - a projected loss of around EUR 500k for 2024.

While at the moment **epi** enjoys a comfortable position in terms of reserves, the continuation of losses at the current rate could modify this situation quickly and dramatically. This could limit our abilities to make critical investments, reduce our flexibility to properly address financial challenges, and, over the long term, even jeopardize **epi**'s ability to operate effectively.

To restore **epi** finances to a sustainable break-even position, after in-depth discussions within the **epi**-Finances Committee involving the Treasurer and **epi** Accounting, and especially considering the cumulated inflation rate since the last subscription fee increase in 2016, a proposal has been put forward during the C96 Council meeting to consider the raise of the annual subscription in 2024.

After thorough consideration and discussion during the C96 Council meeting the following decision regarding the annual subscription for 2024 has been adopted by the Council with 70 votes in favour, 33 votes against and 2 abstentions:

***“Decision 12: Council agrees to set the annual subscription for 2024 at EUR 250 with an increased annual subscription in case of a late payment of 50% of the annual subscription i.e. EUR 375.”***

As a consequence, in accordance with the “Collection of the Decisions of the Council”, Section 4.1 dealing with the European Qualifying Examination, part “Rules governing **epi** studentship”, point 4, which reads as follows: “4. The studentship fee is 50% of the current annual **epi** membership fee and shall be paid annually as provided for by the Treasurer.” the studentship fee for 2024 is set at EUR 125.

Please be advised that the annual subscription serves as the primary income of **epi** enabling the Institute to carry out its tasks and activities including for example:

- Carrying out the EQE together with the European Patent Office;
- Developing and organizing training for members as well as for EQE candidates;
- Support of EQE candidates;
- Financing the preparation of the example modules for training for the new EQE and accompanying educational events for EQE candidates
- Facilitating the dissemination of information and news in the area of patents via the **epi** website and our quarterly journal “**epi** Information”;
- Developing and amending our Code of Conduct to reflect desired changes;
- Dealing with disciplinary matters;

Treasurer • Zsolt Szentpéteri

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- Representing the profession in official bodies which have advisory or legislative powers such as the Administrative Council of the European Patent Organisation (EPOrg);
- Drafting positions and papers on behalf of the profession and submit them to involved official bodies;
- Facilitating measures that assist our members to perform their profession, for example, a professional liability insurance specifically designed for **epi** members.

Please be reminded that the time limit for the payment of the regular annual subscription is:

- (a) **1 April 2024** for members on the list as of 1 January 2024; or  
(b) **three months from the date of entry** for members entered on the list after 1 January 2024.

Members who fail to pay their regular annual subscription before expiry of the time limit mentioned in points a) or b) respectively, still have the possibility to pay the annual subscription together with the increased annual subscription in case of late payment that together amounts to EUR 375 (EUR 250 +50%) within **five months** from the said dates.

Since the obligation to pay the annual subscription becomes automatically due at the beginning of every calendar year, each **epi** member has the duty, without further notice, to pay the annual subscription within the prescribed time limits.

In the absence of payment, **epi** will send at least one reminder to the email or postal address of the member. If the subscription is finally not paid, the Treasurer will have to propose the deletion of said member from the list of Professional Representatives. Upon deletion, the person would not be able to act any more as a Professional Representative before the EPO (in accordance with R.154 EPC).

We appreciate your understanding regarding the necessity of this adjustment to the annual subscription, which has been made to address the current financial challenges and maintain **epi**'s financial stability and will also enable the development of a well-structured mid-term financial strategy. The resulting financial situation, combined with the continues cautious budget planning will result in a more effective financial management and more importantly will also contribute to **epi** progress.

Should you have any questions or observations regarding the present letter or the annual subscription for 2024, please kindly direct your inquiries to **info@patentepi.org**.

Your attention to this significant information is sincerely appreciated. Thank you for your kind consideration.

Zsolt Szentpéteri  
**Treasurer**

Magdalena Augustyniak  
**Secretary General**