# ACCESSION PROCEDURES & ADVANTAGES OF THE MADRID SYSTEM

Kazutaka SAWASATO Legal Section The International Trademarks Registry



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Madrid System



## **Accession Procedures**

Instrument of Accession

Declarations

### Accession to the Madrid Union



- A Paris Union may become a Madrid Union by depositing an instrument of accession.
  - The instruments of accession must be deposited with the Director General of WIPO.
  - The Director General will notify all Contracting Parties including any declarations.
  - The treaty will enter into force three months after the instrument of accession has been notified by the Director General.

### Instrument of accession



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#### Model

#### INSTRUMENT OF ACCESSION TO THE PROTOCOL RELATING TO THE MADRID AGREEMENT CONCERNING THE INTERNATIONAL REGISTRATION OF MARKS

(To be deposited with the Director General of WIPO in Geneva)

The Government of [name of State] hereby declares that [name of State] accedes to the Protocol Relating to the Madrid Agreement Concerning the International Registration of Marks, adopted at Madrid on June 27, 1989.

Done at	, [date]	. 200
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(Signature) (Capacity)

## Declarations made by **Contracting Parties**





- Article 5(2)(b) of the Protocol (Extension to 18 months of the refusal Period)
  - European Community, Singapore, Switzerland, Japan
- Article 5(2)(c) of the Protocol (possible notification of refusals based on an opposition after the 18-month time limit)
  - China, Republic of Korea, Singapore, United States of America
- Article 8(7)(a) of the Protocol (individual fees)
  - China, Republic of Korea, Japan, Singapore, Viet Nam
- Rule 7(2) (declaration of intention to use the mark)
  - Singapore, United Kingdom, United States of America
- Rule 20bis(6)(b)\* (recording of licenses provided for in the domestic law, but the recording of licenses in the International Register has no effect)
  - China, Japan, Russian Federation, Singapore

## **Application Fees**



Madrid System

For the International Bureau:

- Basic fee: 653 CHF (or 903 CHF for color mark)

For a designated Contracting Party:

- Standard designation fee:

· Complementary fee: 100 CHF

and

• Supplementary fee: 100 CHF (for each class beyond 3)

or

 Individual fee: the amount established by that CP (only possible under the Madrid Protocol)

## Fee Reduction For Applicants From Least Developed Countries



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- To improve the ability of trademark owners from LDCs to benefit from the Madrid System
- WIPO offers applicants, originating from LDCs, a 90% reduction in the basic fee.
  - Bhutan, Lesotho, Liberia, Mozambique, Sierra Leone, Sudan, Zambia, Madagascar, Sao Tome and Principe

http://www.wipo.int/ldcs/en/country

## Trilingual Regime



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- An International Application can be filed in English, French or Spanish.
- The Office of Origin is entitled to restrict the choice of the applicant to only one language, or to two languages.

## Domestic legislative or regulatory implications



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 The obligation deriving from accession to the Madrid Protocol would be to give effect to Article 4(1)

#### **Article 4 Effects of International Registration**

- (1)(a) From the date of the registration ..., the protection of the mark in each of the Contracting Parties concerned shall be the same as if the mark had been deposited direct with the Office of that Contracting Party.
- The country must be in a position to give full effect to the provisions of the treaty.



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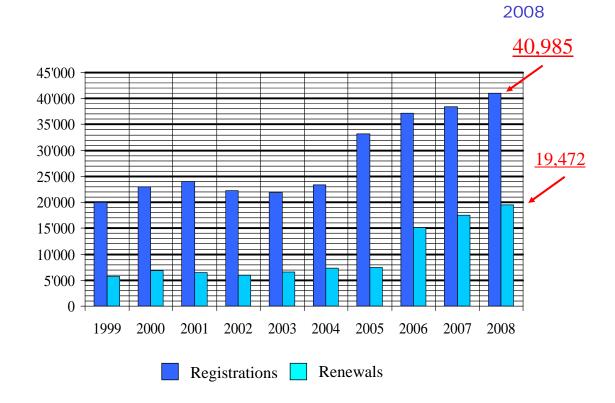


## **Statistics**

## Registrations and Renewals 1999 – 2008



Madrid System



## Most Popular Classes in IRs - 2008

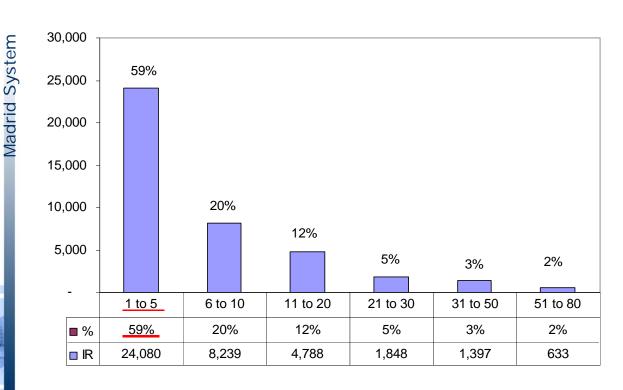
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Classes	<b>Products and Services</b>	2008	Share	Growth
9	Covers e.g. computer hardware and software and other electrical or electronic apparatus of a scientific nature	9'305	8.5%	10.0%
35	Covers services such as office functions, advertising and business management	7'683	7.1%	19.4%
42	Covers services provided by e.g. scientific, industrial or technological engineers and computer specialists	6'092	5.6%	17.4%
25	Covers clothing, footwear and headgear	5'308	4.9%	0.4%
41	Covers services in the area of education, training, entertainment, sporting and cultural activities	4'882	4.5%	12.1%
5	Includes mainly pharmaceuticals and other preparations for medical purposes	4'868	4.5%	3.1%
16	Includes mainly paper, goods made from that material and office requisites	4'652	4.3%	9.6%
3	Includes mainly cleaning preparations and toilet preparations	3'979	3.7%	3.3%
7	Includes mainly machines, machine tools, motors and engines	2'667	3.0%	9.8%
30	Includes mainly foodstuffs of plant of origin prepared for consumption or conservation as well as auxiliaries intended for the improvement of the flavor of food	1'585	2.9%	4.9%

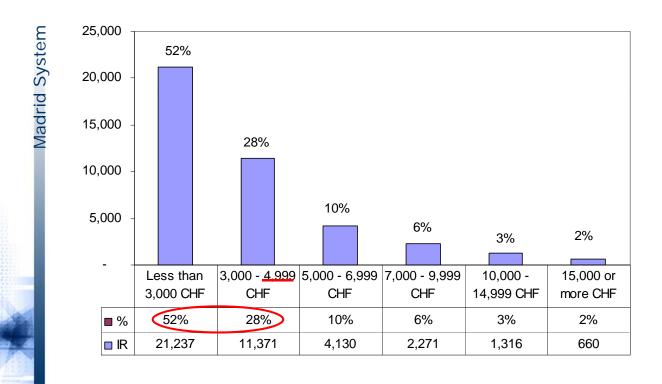
## Number of Designations per International Registration 2008





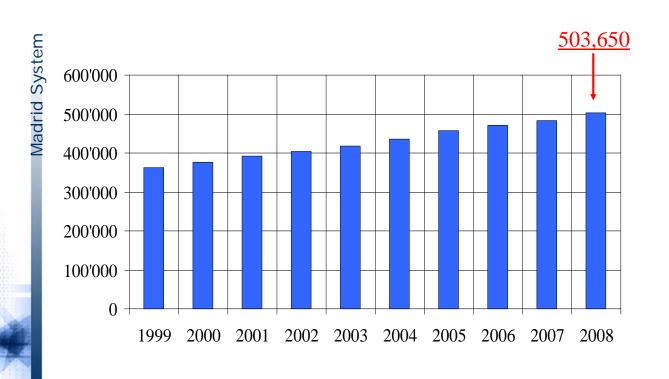
## Amounts of Fees paid per International Registration 2008





## International Registrations In Force 1999 – 2008





## International registrations of trademarks in force



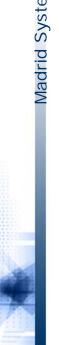
Madrid System

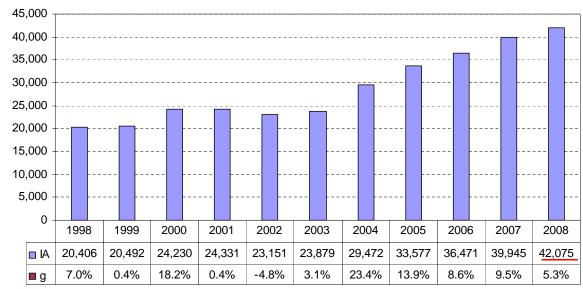
503,650 in total as of December 31, 2008

Number of Trademarks	Number of right-holders	Share
1-2 marks	132, 614	79.7%
3-10 marks	27,816	16.72%
11-100 marks	5,644	3.39%
101-500 marks	297	0.18%
> 500 marks	27	0.02%
All	166,398	100.00%

## International Applications 1998-2008







## Major Filing Contracting Parties 2008



E U	1	Germany	6,214
Madrid System	. 2	France	4,218
rid	3	US	3,684
Mad	4	EC	3,600
	5	Switzerland	2,885
	6	Italy	2,763
	7	Benelux	2,667
	8	China	1,585
edi	9	Japan	1,278
	10	Austria	1,245

## Some Significant Increase in the Number of Applications from CPs - 2008

**Madrid System** 

23

Slovenia

	Ranking	Contracting Party	No. of Applications	Share	Growth
	5	Switzerland	2'885	6.86%	14.77%
	9	Japan	1'278	3.04%	29.88%
	11	Russian Federation	1'190	2.83%	33.86%
	15	Turkey	890	2.12%	24.13%
	19	Poland	416	0.99%	41.50%
-	14	Spain	981	2.33%	14.20%

296

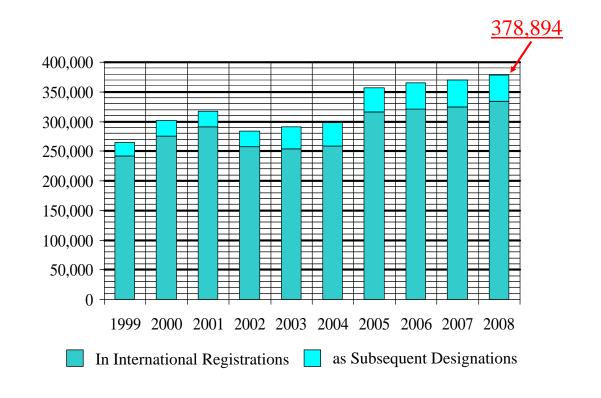
0.70%

62.64%

## Designations 1999 – 2008







## Major Designated Contracting Parties 2008



	1	China	17,829
<u> </u>	2	Russia	16,768
Madrid System	3	US	15,715
2	4	Switzerland	14,907
N	5	EU	14,502
	6	Japan	12,748
	7	Ukraine	10,635
944 944 944 944 944 944 944 944 944 944	8	Australia	10,529
	9	Turkey	9,844
44	10	Norway	9,787
	12	Singapore	7,607
	24	Viet Nam	4,966

### Top Applicants 2008



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- 1 Lidl (Germany)
- 2 Nestlé (Switzerland)
- 3 Henkel (Germany)
- 4 Boehringer Ingelheim (Germany)
- 5 Novartis (Switzerland)
- 6 Janssen Pharmaceutica (Belgium)
- 7 BSH Bosch und Siemens (Germany)
- 8 Zhejiang Medicine Company (China)
- 9 L'Oréal (France)
- 10 Deutsche Telekom (Germany)







- 1 Henkel (Germany)
- 2 Janssen Pharmaceutica (Belgium)
- 3 Novartis (Switzerland)
- 4 L'Oréal (France)
- 5 Nestlé (Switzerland)
- 6 Unilever (Netherlands)
- 7 Sanofi-Aventis (France)
- 8 ITM Enterprises (France)
- 9 Siemens (Germany)
- 10 BASF (Germany)





## **Information and Tools**

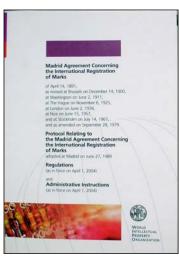
Legal texts, Guide, Gazette Madrid Express, Romarin

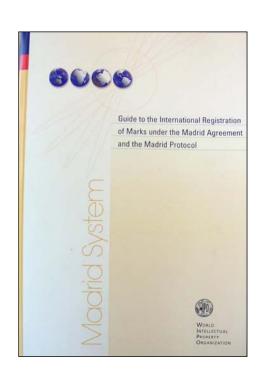
## Legal Texts and Guide



Madrid System

#### Agreement / Protocol Common Regulations Administrative Instructions / Fees

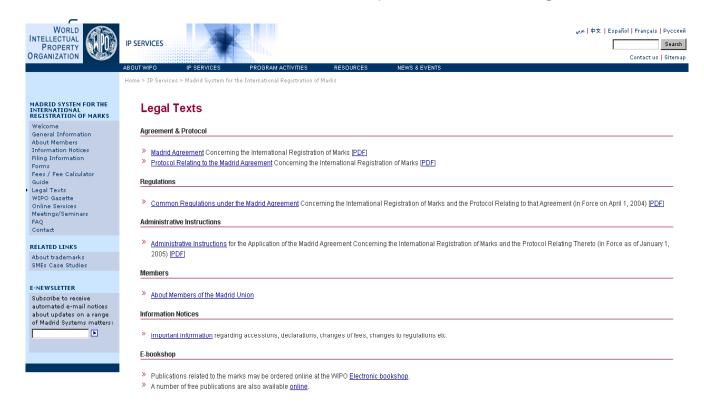




## **Legal Texts**



#### www.wipo.int/madrid/en/legal\_texts



### Guide



#### www.wipo.int/madrid/en/guide



#### Gazette

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## Information Notices

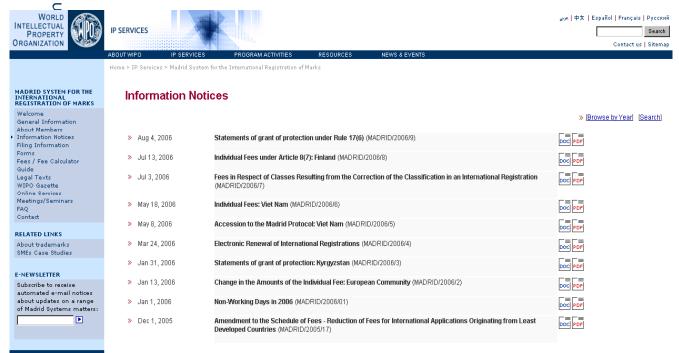


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#### www.wipo.int/madrid/en/notices





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#### WORLD INTELLECTUAL PROPERTY ORGANIZATION

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e-mail: intreg.mail@wipo.int – Internet: http://www.wipo.int

## MADRID PROTOCOL CONCERNING THE INTERNATIONAL REGISTRATION OF MARKS

Claiming of Seniority: European Community

- 1. The Office of the European Community (hereinafter called "OHIM") has drawn the attention of the International Bureau to the following.
- Applicants or holders wishing to claim seniority in respect of a designation of the European Community under the Madrid Protocol will be required to complete a separate official form (MM17), to be annexed to the international application form or the subsequent designation form, as the case may be. The details of seniority claims will be published by the

## Information Concerning Procedures Before IP Offices



- **Madrid System**
- The legal framework of Madrid system incorporates also the national trademark legislations of all Madrid Member states
- In order to improve information concerning this issue, WIPO provides specific information in regard to procedures before IP Offices
  - 76 country profiles to date

www.wipo.int/madrid/en/members/ipoffices info.html

## Information Concerning Procedures Before IP Offices



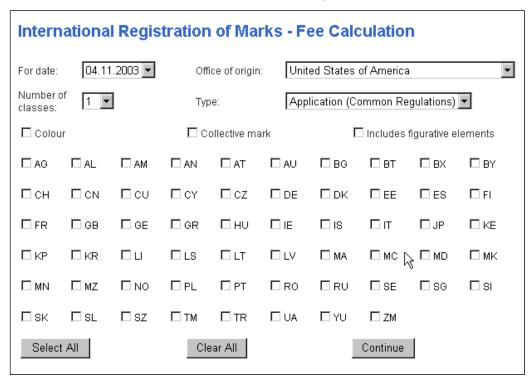
Madrid System



### Fee Calculator



#### www.wipo.int/madrid/en/fees/





## Madrid Express



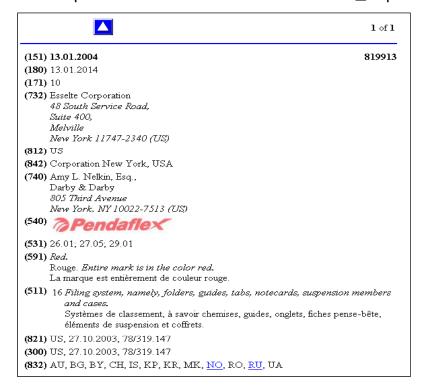
www.wipo.int/madrid/en/services/madrid\_express.htm

Transaction Type	Non available	Da	ata Type:	Non Availa
Ouery:	International Registration Number		=	
AND 🔻	Holder Name		=	
AND 🔻	Representative		=	
AND 🔻	Mark		= pendaflex	
AND 🔻	Vienna Classification  ▼		=	
AND 🔻	Nice Classification		=	
AND 🔻	Goods and Services (English)		=	
AND 🔻	Goods and Services (French)		=	
AND 🔻	Goods and Services (Spanish)		=	
AND 🔻	Office of Origin		=	
AND 🔻	Basic Application Number		=	
AND 🔻	Basic Registration Number		=	
AND 🔻	Designated Contracting Parties		=	

## Madrid Express



www.wipo.int/madrid/en/services/madrid\_express.htm

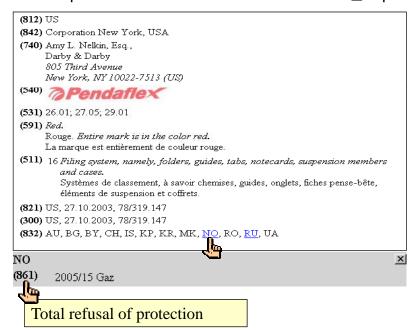


Madrid System

## **Madrid Express**



#### www.wipo.int/madrid/en/services/madrid\_express.htm

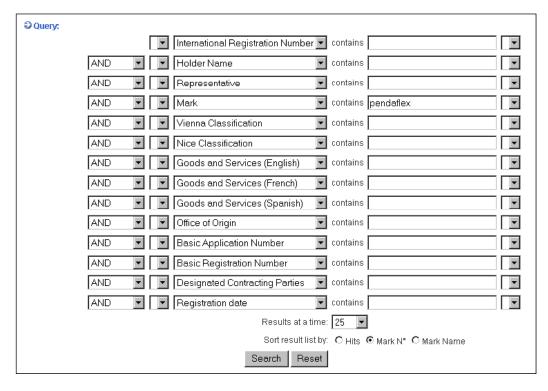


### ROMARIN

**Madrid System** 



#### www.wipo.int/madrid/en/romarin/index.htm

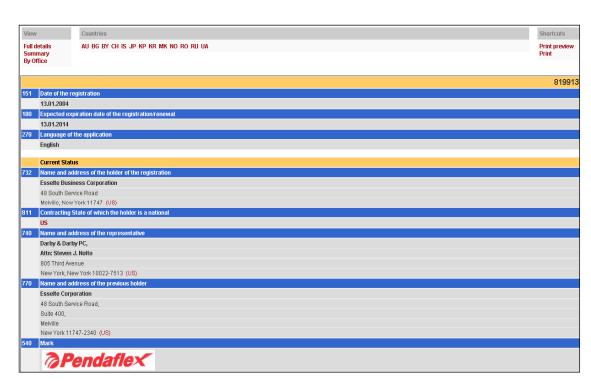


### ROMARIN



www.wipo.int/madrid/en/romarin/index.htm

Madrid System



## International Application Simulator



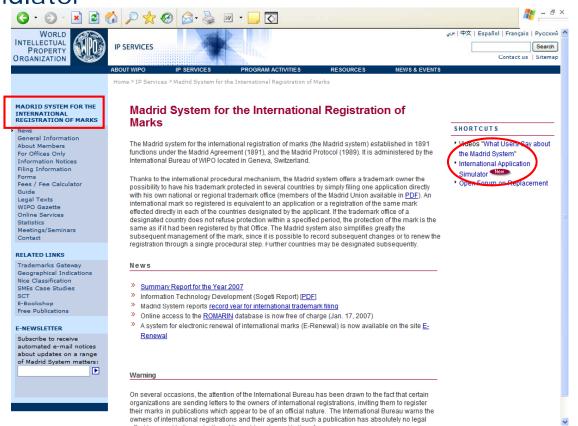
- Madrid System
- A first step to develop an International Application Processor- Simulator responds specifically to the individual need when seeking protection of your mark abroad
- At the end of the simulation, after plugging in the data, the simulator shows your cost estimate of registering the mark

www.wipo.int/madrid/en/madrid\_simulator/

## The International Application Simulator

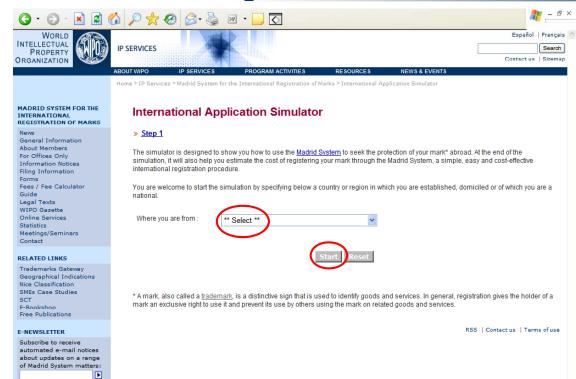






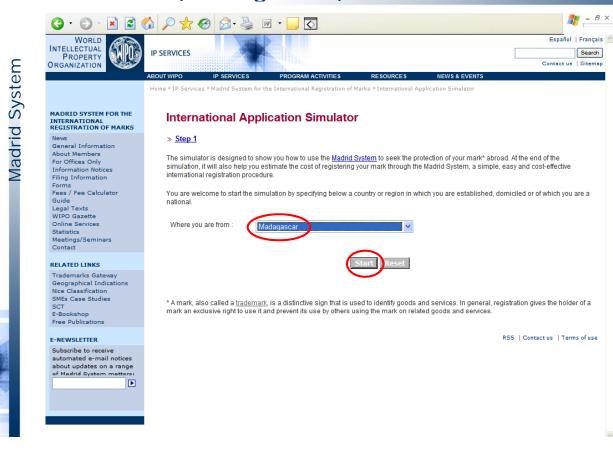
## Simulator Main Page





## Selected OO (Madagascar)





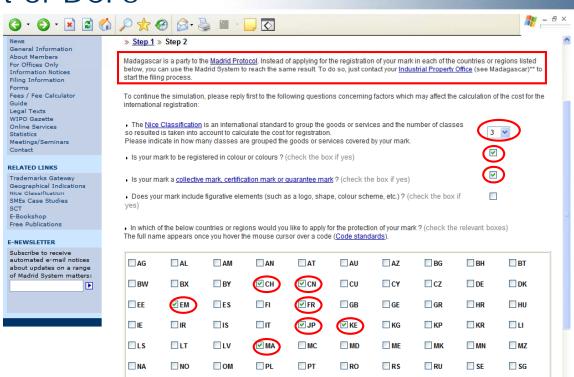


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- SI



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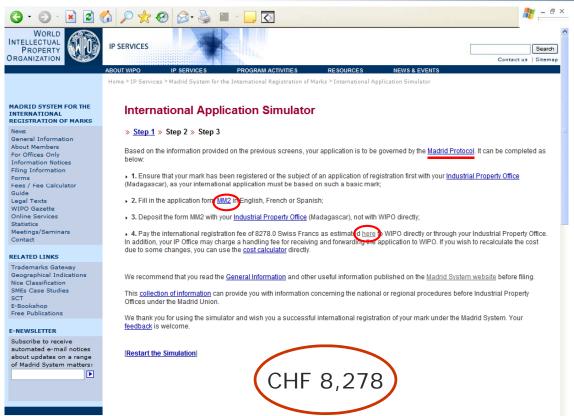
UA

**US** 

## Calculation







## Calculation



Amount	of	Fees	payable	for	your	international	application	as	simulated	above

Basic fee where any reproduction of the mark is in color 90 Complementary fee :3 x 73.00 CHF 219 Switzerland Individual fee : 450 China Collective individual fee: 929 Individual fee / supplementary fee (collective mark):2 x 465.00 (1 class free) 930 **European Community** Collective individual fee 4151 Individual fee (first part): 115 Individual fee / supplementary fee (first part):2 x 88.00 (1 class free) 176 United States of America Individual fee / supplementary fee :3 x 406.00 (0 classes free) 1218 TOTAL: (CHF) 8278.0 Comments The complementary fee (if applicable) is related to the number of Contracting Parties The supplementary fee (if applicable) is related to the number of classes beyond the third Individual fees (if applicable) are payable for some Protocol Contracting Parties



## Advantages of the Madrid System

Regal developments
Advantages of the Madrid System

## Recent Developments in the Madrid System (1)



- Madrid System
- Repeal of the Safeguard Clause
  - Protocol regulates the relations in the mutual relations of Contracting Parties bound by both treaties
- Full Trilingual Regime
- Increase of the standard fees from 75 to 100 CHF

## Recent Developments in the Madrid System (2)



Madrid System

- Due to enter into force on Sept. 1, 2009 following amendments:
  - Improve accessibility of information regarding the state of IRs in designated CPs : a statement of grant of protection will become obligatory
  - Madrid Assembly in 2008, took decision to conduct a study for a possible enlarging of the language regime for introducing Arabic, Russian, Chinese and Portuguese as official filing languages

## **Recent Accessions**



Madrid System

- Madagascar (P): January 28, 2008
- Ghana (P): September 16, 2008
- Sao Tome and Principe (P): December 8, 2008
- Bosnia-Herzegovina (P): January 27, 2009
- Egypt (P): September 3, 2009

## **Prospective Accessions**



Madrid System

- Most promising
  - Colombia, Israel, Tajikistan (A), Kazakhstan (A), Sudan (A)
- Under consideration
  - **—** ...... ,

### Benefits For Trademark Owners



# Madrid System

- Faster
  - A single international application has the same legal effect as a national application
  - A fixed dead line for refusal.
- Simpler
  - A single Renewal date
  - A single transaction to change company details
- Cheaper
  - No need to pay local agents at the filing stage
  - No translation of the paperwork into several languages

### Benefits For the Government



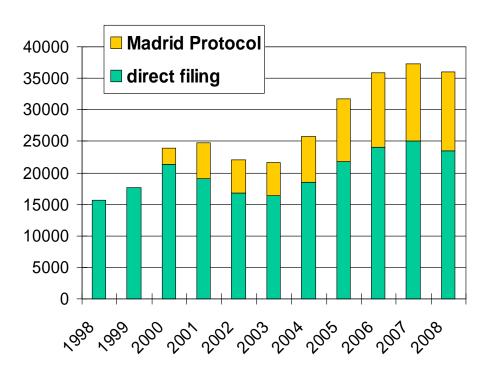
Madrid System

- Positive Effect on Economic Growth
  - Empowers SMEs, a important engine for economic growth, by contributing to the opening of new markets and assisting in the development of exports
  - Creates a more favorable climate for foreign investment
- Advantages for the Government's Finance
  - Generates revenue

### Trademark Applications by nonresidents with the JPO



Madrid System



The Japan Patent Office Annual Report 2008

### Benefits For the IP Offices



Madrid System

- Would not bring an overwhelming number of new applications.
- Eases burden due to formalities examination and other services provided by IB, e.g., publication in WIPO Gazette, searchable databases (Internet and optical disks), etc.

## Benefits For Local Agents



- Madrid System
- Increased designations can result in preregistration and post-registration business for local counsel, e.g.,
  - clearance of mark
  - refusals
  - oppositions
  - enforcement
- In an expanding local economy, the Madrid System serves as an incentive to file international applications and maintain portfolios of international registrations

## Conclusion – The Madrid System



Madrid System

## Eases Registration & Management

Empowers Businesses

Join the Madrid System!



Kazutaka.Sawasato@wipo.int

