

Committee on WIPO Standards (CWS)

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ANNUAL TECHNICAL REPORTS (ATRS) ON PATENT, TRADEMARK AND INDUSTRIAL DESIGN INFORMATION ACTIVITIES IN THE CONTEXT OF WIPOSTAD

Document prepared by the Secretariat

1. As reported by the International Bureau (IB) at the eleventh session of the former Standards and Documentation Working Group (SDWG), in October 2009, (see document SCIT/SDWG/11/14, paragraph 67), the WIPOSTAD (WIPO Standards Administration Database) will, in addition to WIPO Standards, include information on industrial property office (IPOs) practices in the field of industrial property information and documentation along with corresponding examples. These materials are currently published as surveys in Part 7 of the WIPO Handbook on Industrial Property Information and Documentation (WIPO Handbook).
2. Taking into account that Annual Technical Reports on industrial property information activities (ATRs) constitute another source of information on the IPOs' practices in this field, which may be maintained in a similar way as the surveys of Part 7 of the WIPO Handbook, the Secretariat intends to publish the information in the ATR part of the WIPO website, accordingly modified, under the WIPOSTAD platform. These materials will form the "Annual Technical Reports" section of the WIPOSTAD, where each report will be permanently posted on a separate web-page assigned to the responding IPO and updated annually (i.e., in spite of the current practice of submitting a new ATR every year, the IPO will annually revise and update the existing report published in the WIPOSTAD). It is expected that this practice will provide a more effective way of ATR management increasing the level of automation on all stages of ATR life-circle, i.e. preparation, submission, verification, publication, etc.

3. On the basis of "Recommended content of the ATRs", as approved at the ninth session of SDWG (see document SCIT/SDWG/9/12, paragraphs 64 – 70), the IB has prepared, for consideration and approval by the CWS, three simplified recommended contents of ATRs on information activities in the patent, trademark, and industrial design domains, which, if agreed, will constitute the framework of the above-mentioned part of WIPOSTAD, after the necessary adaptations. The recommended contents are respectively reproduced in Annex I, Annex II, and Annex III to the present document.

4. *The CWS is invited to:*

(a) *note the information provided in paragraphs 1 – 3 above;*

(b) *consider and approve the recommended contents of ATRs on patent information activities to be used in WIPOSTAD as reproduced in Annex I to the present document;*

(c) *consider and approve the recommended contents of ATRs on trademark information activities to be used in WIPOSTAD as reproduced in Annex II to the present document; and*

(d) *consider and approve the recommended contents of ATRs on industrial design information activities to be used in WIPOSTAD as reproduced in Annex III to the present document.*

[Annexes follow]

RECOMMENDED CONTENTS OF ANNUAL TECHNICAL REPORTS ON PATENT INFORMATION ACTIVITIES

1. GENERAL OVERVIEW OF RECENT DEVELOPMENTS IN PATENT INFORMATION ACTIVITIES CARRIED OUT BY THE OFFICE

- (a) Outline of main policies and plans aimed at development of patent information activities and expected time frames for their realization
- (b) New projects launched or resumed this year in the context of the policies and plans mentioned above, short description: aims, partners, tasks
- (c) Main areas of patent information activities and related information and communication technology (ICT) practices which were in the focus of attention last year
- (d) Statistics: changes in terms of application filings and grants with respect to previous year; trends or areas experiencing rapid changes
- (e) Other matters and useful links (URLs): annual report of the Office, news page, statistics, etc.

2. SERVICES AND ACTIVITIES RELATED TO PATENT INFORMATION CARRIED OUT BY THE OFFICE

- a) Information and support provided by the Office to applicants regarding filing on paper and/or e-filing (instructions, seminars, etc.) – URLs
- b) Availability of the application dossier in electronic form
- c) Classification¹, preclassification² (if applicable), reclassification³ activities; classification systems used (e.g., International Patent Classification (IPC)); matters concerning indexing of patent information
- d) Abstracting, reviewing, and translation of the information contained in patent documents
- e) Other activities

3. SOURCES OF PATENT INFORMATION PROVIDED BY THE OFFICE

- (a) Main types of publications of the Office (patent applications, full text, first pages, abstracts, bibliographic data, granted patents, etc.), medium (on paper, on CDs, online – URLs)

¹ Classification is allotting one or more classification symbols (e.g., IPC symbols) to a patent application.

² Preclassification is allotting an initial broad classification symbol (e.g., IPC class or subclass, or administrative unit) to a patent application, using human or automated means for internal administrative purposes.

³ Reclassification is the reconsideration and usually the replacement of one or more previously allotted classification symbols to a patent document, following a revision and the entry into force of a new version of the Classification system (e.g., the IPC). The new symbols are available on patent databases.

- (b) Official Gazettes: main types of announcements, frequency of publication, medium (on paper, on CDs, online – URL), etc.
- (c) Information products and patent document collections (coverage, medium, etc.) available to examiners, including external collections and databases
- (d) Information products and patent document collections (coverage, medium, etc.) available to external users, conditions of access (e.g., free of charge, subscription, etc.)
- (e) Legal status information (kind of information, coverage, medium, etc.)
- (f) Other sources

4. ICT SUPPORT TO SERVICES AND ACTIVITIES RELATED TO PATENT INFORMATION CARRIED OUT BY THE OFFICE

- (a) Specific software tools supporting business procedures within the Office: general description, characteristics, advantages, possible improvements
- (b) Hardware used to supporting business processes of the Office
- (c) Internal databases: coverage, updates, interlinks with external sources
- (d) Establishment and maintenance of electronic search file: file building, updating, storage, documents from other offices included in the search file
- (e) Administrative management electronic systems (register, legal status, statistics, and administrative support)
- (f) Other matters

5. PROMOTION ACTIVITIES AIMED TO SUPPORT USERS IN ACCESS AND EFFICIENT USE OF PATENT INFORMATION

- (a) Patent library: equipment, collection management, network of patent libraries in the country, cooperation with foreign patent libraries
- (b) Publications related to different business procedures and patent information sources available to users, for example, books, brochures, Internet publications, etc.
- (c) Office's initiatives on providing foreign patent information in the local language(s) (e.g., machine translation tools, translation of abstracts)
- (d) Cooperation with universities, research centers, technology and innovation support centers, etc.
- (e) Education and training: training courses, e-learning modules (URLs), seminars, exhibitions, etc.
- (f) Other activities

6. INTERNATIONAL COOPERATION ACTIVITIES IN THE FIELD OF PATENT INFORMATION

- (a) International exchange and sharing of patent information in machine-readable form, e.g., priority documents, bibliographic data, abstracts, search reports, full text information
- (b) Participation in international or regional activities and projects related to patent information
- (c) Assistance to developing countries
- (d) Other activities

7. OTHER RELATED MATTERS

[Annex II follows]

RECOMMENDED CONTENTS OF ANNUAL TECHNICAL REPORTS ON TRADEMARK INFORMATION ACTIVITIES

- 1. GENERAL OVERVIEW OF RECENT DEVELOPMENTS IN TRADEMARK INFORMATION ACTIVITIES CARRIED OUT BY THE OFFICE**
 - (a) Outline of main policies and plans aimed at development of trademark information activities and expected time frames for their realization
 - (b) New projects launched or resumed this year in the context of the policies and plans mentioned above, short description: aims, partners, tasks
 - (c) Main areas of trademark information activities and related information and communication technology (ICT) practices which were in the focus of attention last year
 - (d) Statistics: changes in terms of application filings and registrations with respect to previous year; trends or areas experiencing rapid changes
 - (e) Other matters and useful links (URLs): annual report of the Office, news page, statistics, etc.

- 2. SERVICES AND ACTIVITIES RELATED TO TRADEMARK INFORMATION CARRIED OUT BY THE OFFICE**
 - (a) Information and support provided by the Office to applicants regarding filing on paper and/or e-filing (instructions, seminars, etc.) – URLs
 - (b) Availability of the application dossier in electronic form
 - (c) Matters concerning classifying
 - (i) Classification and reclassification activities; classification systems used, e.g., International Classification of Goods and Services for the Purposes of the Registration of Marks (Nice Classification), International Classification of the Figurative Elements of Marks (Vienna Classification), other classification
 - (ii) Use of electronic classification systems and pre-defined terms of the classification applied
 - (d) Matters concerning processing of different types of non-traditional marks (e.g., three-dimensional, motion, hologram, color mark, etc.)
 - (e) Other activities

- 3. SOURCES OF TRADEMARK INFORMATION PROVIDED BY THE OFFICE**
 - (a) Main types of publications in the field of trademark information, outline of the content and medium (on paper, on CDs, online – URLs)
 - (b) Official Gazettes: main types of announcements, frequency of publication, medium (on paper, on CDs, online (URL), etc.
 - (c) Information products (coverage, medium, etc.) available to examiners, including external documentation and databases
 - (d) Information products (coverage, medium, etc.) and services available to external users; conditions of access (e.g., free of charge, subscription, etc.)

- (e) Legal status information (kind of information, coverage, medium, etc.)
- (f) Other sources

4. ICT SUPPORT TO SERVICES AND ACTIVITIES RELATED TO TRADEMARK INFORMATION CARRIED OUT BY THE OFFICE

- (a) Specific software tools supporting business procedures within the Office: general description, characteristics, advantages, possible improvements
- (b) Hardware used to supporting business processes of the Office
- (c) Internal databases: coverage, updates, interlinks with external sources
- (d) Establishment and maintenance of electronic search file: file building, updating, storage, documents from other offices included in the search file
- (e) Administrative management electronic systems (register, legal status, statistics, and administrative support)
- (f) Other matters

5. PROMOTION ACTIVITIES AIMED TO SUPPORT USERS IN ACCESS AND EFFICIENT USE OF TRADEMARK INFORMATION

- (a) Office's library (if deals with trademark information): equipment, collection management, network of libraries in the country, cooperation with foreign libraries
- (b) Publications related to different business procedures and trademark information sources available to users, for example, books, brochures, Internet publications, etc.
- (c) Cooperation with universities, technology and innovation support centers, etc.
- (d) Education and training: training courses, e-learning modules (URLs), seminars, exhibitions, etc.
- (e) Other activities

6. INTERNATIONAL COOPERATION ACTIVITIES IN THE FIELD OF TRADEMARK INFORMATION

- (a) International exchange of trademark information in machine-readable form (e.g., Official Gazettes)
- (b) Participation in international or regional activities and projects related to trademark information
- (c) Assistance to developing countries
- (d) Other activities

7. OTHER RELATED MATTERS

[Annex III follows]

RECOMMENDED CONTENTS OF ANNUAL TECHNICAL REPORTS ON INDUSTRIAL DESIGN INFORMATION ACTIVITIES

- 1. GENERAL OVERVIEW OF RECENT DEVELOPMENTS IN INDUSTRIAL DESIGN INFORMATION ACTIVITIES CARRIED OUT BY THE OFFICE**
 - (a) Outline of main policies and plans aimed at development of industrial design information activities and expected time frames for their realization
 - (b) New projects launched or resumed this year in the context of the policies(plans) mentioned above, short description: aims, partners, tasks
 - (c) Main areas of industrial design information activities and related information and communication technology (ICT) practices which were in the focus of attention last year
 - (d) Statistics: changes in terms of application filings and grants (registrations) with respect to previous year; trends or areas experiencing rapid changes
 - (e) Other matters and useful links (URLs): annual report of the Office, news page, statistics, etc.

- 2. SERVICES AND ACTIVITIES RELATED TO INDUSTRIAL DESIGN INFORMATION CARRIED OUT BY THE OFFICE**
 - (a) Information and support provided by the Office to applicants regarding filing on paper and/or e-filing (instructions, seminars, etc.) – URLs
 - (b) Availability of the application dossier in electronic form
 - (c) Classification and reclassification activities; classification system used, e.g., International Classification for Industrial Designs (Locarno Classification), other classification
 - (d) Other activities

- 3. SOURCES OF INDUSTRIAL DESIGN INFORMATION PROVIDED BY THE OFFICE**
 - (a) Main types of publications in the field of industrial design information, outline of the content (industrial design applications, design patents, registrations, etc.) and medium (on paper, on CDs, online – URLs)
 - (b) Official Gazettes: main types of announcements, frequency of publication, medium (on paper, on CDs, online – (URL), etc.
 - (c) Information products (coverage, medium, etc.) available to examiners, including external documentation and databases
 - (d) Information products (coverage, medium, etc.) and services available to external users; conditions of access (e.g., free of charge, subscription, etc.)
 - (e) Legal status information (kind of information, coverage, medium, etc.)
 - (f) Other sources

4. ICT SUPPORT TO SERVICES AND ACTIVITIES RELATED TO INDUSTRIAL DESIGN INFORMATION CARRIED OUT BY THE OFFICE

- (a) Specific software tools supporting business procedures within the Office: general description, characteristics, advantages, possible improvements
- (b) Hardware used to supporting business processes of the Office
- (c) Internal databases: coverage, updates, interlinks with external sources
- (d) Establishment and maintenance of electronic search file: file building, updating, storage, documents from other offices included in the search file
- (e) Administrative management electronic systems (register, legal status, statistics, and administrative support)
- (f) Other matters

5. PROMOTION ACTIVITIES AIMED TO SUPPORT USERS IN ACCESS AND EFFICIENT USE OF INDUSTRIAL DESIGN INFORMATION

- (a) Office's library (if deals with industrial design information): equipment, collection management, network of libraries in the country, cooperation with foreign libraries
- (b) Publications related to different business procedures and industrial design information sources available to users, for example, books, brochures, Internet publications, etc.
- (c) Cooperation with universities, technology and innovation support centers, etc.
- (d) Education and training: training courses, e-learning modules (URLs), seminars, exhibitions, etc.
- (e) Other activities

6. INTERNATIONAL COOPERATION ACTIVITIES IN THE FIELD OF INDUSTRIAL DESIGN INFORMATION

- (a) International exchange of industrial design information in machine-readable form (e.g., Official Gazettes)
- (b) Participation in international or regional activities and projects related to industrial design information
- (c) Assistance to developing countries
- (d) Other activities

7. OTHER RELATED MATTERS

[End of Annexes and of document]