

# IP Office *Transformation*





# Index

## **Discussion: IP office transformation**

### **Preparatory process**

#### **General introduction**

#### **Overview**

- 1.1 Road map
- 1.2 Defining the main themes of the Lima meeting
- 1.3 Meeting of heads of industrial property offices (Lima, Peru)

## **Day 2 - Session with the Japan Patent Office**

### **Continuation (workshop)**

- 1. Infrastructure and new technologies**
- 2. Management and enforcement of intellectual property rights**
- 3. Políticas Públicas**
- 4. Promoción, Formación y Servicios para los Usuarios**
- 5. Asociaciones Estratégicas y Colaboración**
- 8. Otras consideraciones**
- 9. Nota final**
- 10. Nota final del equipo facilitador**
- 11. Anexos**



# Discussion IP office transformation



The **Regional Meeting of Heads of Industrial Property Offices of Latin American Countries** is an event organized by the Division for Latin American and the Caribbean every two years. The 2022 edition took place in Lima, from October 4 to 6, 2022, and was organized in collaboration

with the National Institute for the Defense of Competition and Protection of Intellectual Property (INDECOPI) of Peru with the assistance of the **WIPO Brazil Office and Funds-In-Trust Japan Industrial Property Global (FIT/Japan IP Global)**.

The main aim of these regional meetings is to create a **forum for heads of industrial property offices** to discuss major current and future challenges, options and paths to follow, the measures that they are taking and potential collaboration mechanisms to address the challenges of the new industrial property ecosystem within the subregion.

The heads of the intellectual property (IP) offices of 16 countries in the region (Argentina, Brazil, Chile, Costa Rica, Cuba, the Dominican Republic, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Panama, Paraguay, Peru, Uruguay and Venezuela) attended the meeting and actively participated in the discussions. The list of participants is attached to this document.

As the meeting coincided with an official visit to Peru by **Mr. Daren Tang, WIPO Director General**, an initial discussion and exchange session was held with the office heads on the theme 'IP office transformation'.

Mr. Tang gave a 15-minute talk ([link](#)) and presented ideas on the role that IP offices should play in promoting innovation and development in the region. He emphasized the role of the offices in contributing to the efforts of countries to ensure that their industrial property systems **stimulate innovation and creativity** and, to that end, enable all stakeholders in society to participate and adapt to the **challenges of the future**.

Mr. Tang noted that with trademark filings across the region growing, venture capital investments increasing and Latin America being a **dynamic engine of the global creative economy**, governments, businesses and communities throughout the region are paying attention to IP as never before.



He **reaffirmed WIPO's continued support** for Latin American IP offices in their transformation, including through new projects that brought IP to the grassroots, unlocked IP financing for SMEs and facilitated active participation in the international IP system.

This talk was followed by a 45-minute **discussion between the Director General and the IP office heads** during which they exchanged a wide range of views on developments shaping IP policy in Latin America. The Director General asked each office head a question on a specific subject selected according to each country's interest.

# Preparatory process



In order to maximize the impact of the Director General's talk and achieve greater interaction with the participating office heads, the meeting was structured to enable the attendees to enter fully into the subject matter of the discussion and thus enhance the ideas presented. Audiovisual resources

(including simultaneous interpretation) were also available, and the session was recorded.

To facilitate the Director General's leadership of the discussion, extensive planning and consultations were carried out with all Latin American IP offices to select the main subject



of interest to each office so that the head of each office could comment and/or present specific achievements or actions. Subject sheets were prepared for this purpose ([see annex](#)) to cover each specific theme under **the five main discussion topics:**

1. Infrastructure and new technologies.

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2. Management and enforcement of IP rights (IPRs).

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3. Public policies.

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4. Promotion, training and services for users.

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5. Collaboration and strategic partnerships



A welcome coffee was held before the start of the session to allow participants to speak with the Director General and register for the meeting using a system that produced an avatar badge. This activity served to familiarize the participants with the concept of the meeting, which used modern communication tools and tables to facilitate dialogue and was representative of the current transformation journey of the offices of the region as they move from being service providers to being innovation hubs.

# General Introduction



This document presents the activities carried out during the **Regional Meeting of Heads of Industrial Property Offices of Latin American Countries**, held in Lima (Peru) on October 5 and 6, 2022.

This space for conversation and joint creativity could be described as an 'ideas laboratory' in which the region's IP requests and offers converge to explore opportunities for future cooperation between countries.

The challenges posed by a new world order in IP demand speed, preparation and experience in order to decisively support the processes of productive transformation involved.

With a view to being proactive and keeping pace with the current transformation of our society, WIPO actively promotes forums for discussion, reflection and global cooperation, which generate possibilities for strengthening IP among governments, industries and consumers, to promote high standards of ethics and respect for the free development of markets and the strengthening of economic models.

Maintaining a dynamic of progress that drives the socioeconomic development of regions and countries is a goal worthy of every effort by policymakers to establish

procedures and standards for a more just, equitable and sustainable society.

Today is an auspicious moment for Latin America, and WIPO must be attentive and promote the region, which holds great potential for the world. **The transformation of industrial property offices is real**, and each attendee to this meeting can make a significant contribution to it.

**Thank you for facing this challenge together.**





# Overview

## Phases of the process

### 1.1 Road map

A) Between September and December 2021, the transformation road map for the region's IP offices was established.

The following activities were carried out for this purpose:

#### **In-depth surveys**

An 18-question survey was developed to gain in-depth knowledge of the opinions of the region's office heads. It included the following questions:

What do you think the main IP challenge(s) facing Latin American countries today is?

What factors could lead to changes in the IP ecosystem in Latin America?

How is your office preparing to address these challenges and change factors?

Do you have information or research mechanisms to establish the level of user and/or sector interest in the IP ecosystem in your country?

The survey was supplemented with one-on-one interview sessions with the office heads. The surveys were reviewed point by point to analyze the answers in more detail and create a frame of reference using related priorities for the region, thus raising possibilities for cooperation.

For more details on these responses and comments, please refer to the following link:

[IN-DEPTH SURVEYS](#)

### 1.2 Defining the themes of the Lima meeting

On the basis of the interview results, a two-morning virtual meeting was held, during which several areas of interest that would be discussed at the Lima meeting in 2022 were initially introduced.

The survey results were processed using artificial intelligence (AI) tools and presented during the meeting. Given the number of variables mentioned and the diversity of responses, the facilitating team had recommended processing the results using ATLAS ti\*, which is software for qualitative data analysis.

\* ATLAS ti is a tool created to support data analysis and interpretation in qualitative research. It is used to analyze semi-structured data, such as individual in-depth interviews and individual interviews, which help to improve understanding of behaviors and other undefined variables that may be implicit in individuals' responses, in order to better understand the contexts in which the results obtained from the data can be used. ([Atlas Ti](#))

A case study was also presented during this meeting:

#### **Digital analysis of IP concepts and public opinion**

A study of digital media in Latin America was conducted to determine the public's main ideas about intellectual and industrial property. Using data mining tools, we

determined the level of knowledge about IP and WIPO, and the subjects, audiences and directions of the conversation in this area.

With this information as a frame of reference, we examined the overall results as a team to jointly select those that were most relevant and strategic for most countries:

**Acercar la P.I. a los jóvenes**

**Capacitación**

**Cultura Políticas Públicas  
Seguimiento y trazabilidad**

**Difusión**

**Soluciones a la medida**

**Tecnología**

**Cooperación**

The minutes of the meeting are available here: [DECEMBER REPORT](#).

## Second phase of the project

March 2022, the second phase of the project was launched on the basis of the five areas of interest defined with the office heads of the region during the preparatory phase in December 2021:

1. Infrastructure and new technologies.
2. IPR management and enforcement.
3. Public policies.
4. Promotion, training and services for users.
5. Collaboration and strategic partnerships.

As an addition to the previous activity, in April 2022, WIPO prepared and sent out a three-question survey to establish the current status of the countries in the region regarding their three main needs (requests) and capacities (offers) with respect to cooperation with the other countries in the region.

### The questions were:

**A)** What are the three main needs of your office that you think will require cooperation measures/programs and/or projects?

**B)** What are the three main capacities/ areas of expertise in your office that you could make available to other offices in collaborative actions/ programs/projects in the region?

**C)** In your opinion, what are the two main areas/topics in which inter-regional collaboration would be suitable and/or relevant? With which region would you like to establish collaborative synergies and exchange?

The responses for each country can be found at the following link: [WIPO 2022 QUESTIONNAIRES](#)

The responses were used to produce a table to find potential matches between the needs (requests) and capacities (offers) of countries, with a view to facilitating the relevant discussions during the meeting in Peru and drawing up a list of possible future initiatives to conclude the meeting.

### 1.3 Meeting of Heads of Industrial Property Offices, Lima (Peru)

**Program**  
Day 1:  
October 4

**Workshop**  
Matches and  
World Café

The central activity of the event took place from mid-morning on October 4 until the end of the day, using an innovative dynamic called 'World Café' (which is now globally widespread and recommended for

developing strategic plans and constructive discussions among broad groups with common goals). The needs (requests) and capacities (offers) of the different countries in relation to the five main meeting themes were presented, and the participants rotated among tables in order to converse in more depth about shared issues with potential for direct and fluid collaboration.

Before starting the activity, Oswaldo Gironeé, WIPO representative, and Leonardo Aguirre, CEO of StoryInc®, explained the background of the exercise, outlined the participation agreements and established a timetable for the various stages.



To unleash their full **creative potential**, attendees were asked to read a children's story at their tables, transform it and change the traditional ending. The group that **stood out** the most was the one that turned Little Red Riding Hood into a story of entrepreneurship: the grandmother with the delicious recipe; Little Red Riding Hood, a skilled baker; and the wolf, a capital investor who helps them grow the business into a famous brand. With success imminent, they register the brand name of their product, patent their recipe and everyone lives...

**HAPPILY EVER AFTER!**

The table prepared with the WIPO team was used as consultation material for the exercise, with the data from the survey sent to the countries of the region being refined to seek the best “possible correlation” between the requests and offers of the participating countries. [\(See results\)](#)

The resulting table shows columns of requests from each country and those countries offering to share practices to help meet those requests or needs or find alternative solution pathways, based on their experiences, and a column of additional feedback that the facilitators were free to use to encourage conversation among the countries.

The office heads had the opportunity to talk to up to four different countries for 35 minutes over the course of five rounds, with a total of 80 rotations planned for the first day.

One subject was assigned to each facilitator, who rotated tables, as did the countries, in order to minimize repetition between countries and subjects.

These conversations were guided by a facilitator at each table, who took notes, compiled comments and helped shape the ideas that emerged.

**This first day ended with very positive comments about the dynamics.**

• *“I really liked this way of exchanging opinions through a guided conversation.”*

*Costa Rica*

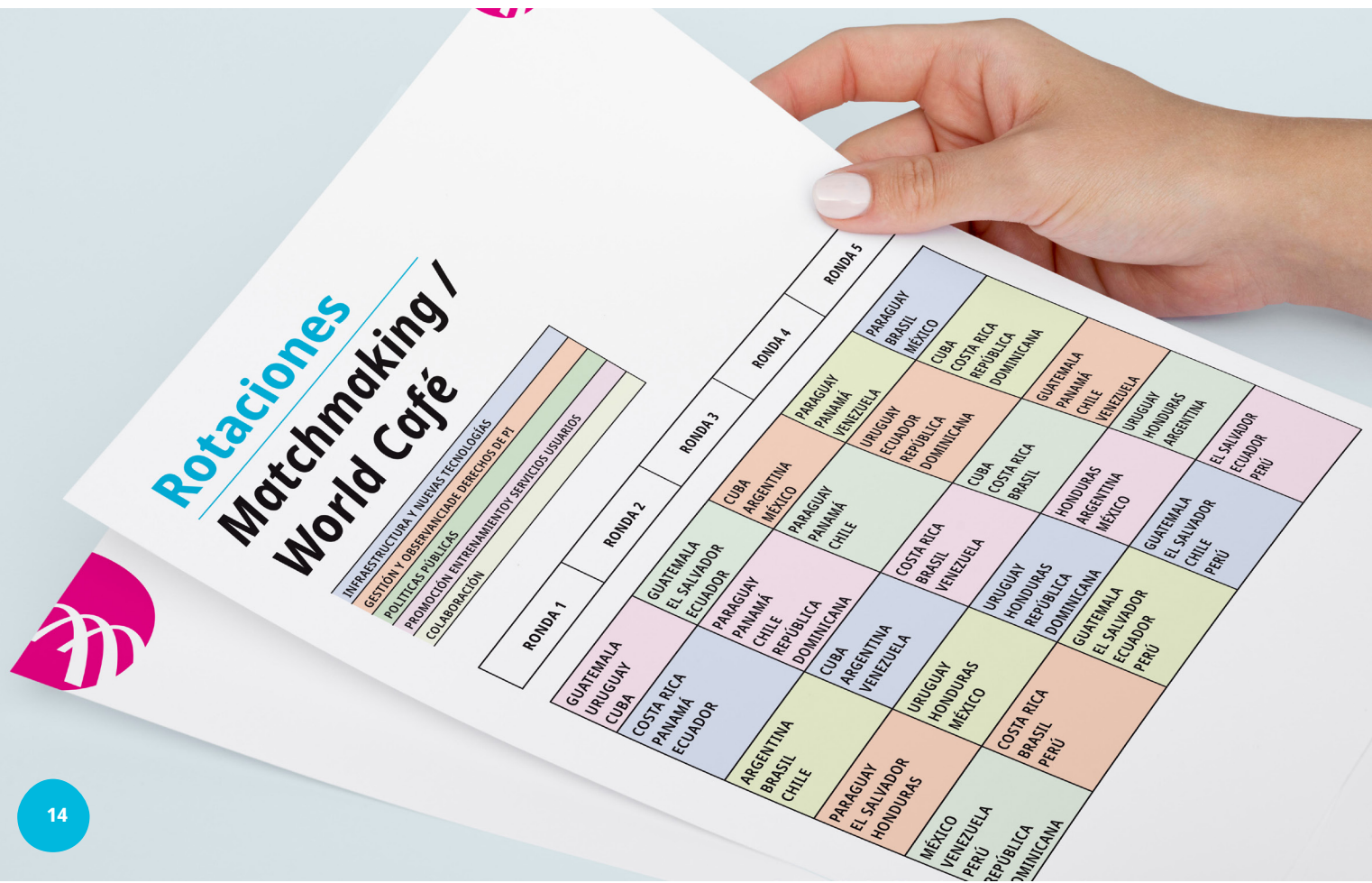


• *“It is extremely interesting to have the chance to share so many experiences with our colleagues and to discover that we have so many common challenges.”*

*Argentina*

• *“We need to think about how to turn these best practices into indicators that boost competitiveness in the different countries of the region.”*

*Cuba*







## Day 2: Session with the *Japan Patent Office*



In order to promote exchange and foster future interregional collaboration, WIPO included in the second day of meetings a session in which representatives of the Japan Patent Office (JPO) participated in person. The main objective was to exchange views with the heads of the Latin American offices on various topics in which interregional

collaboration is being developed and/or could be established, especially in relation to the modernization and digitization challenges faced by IP offices.

Mr. Masanori Katsura, JPO Deputy Commissioner, Mr. Masaki Okamoto and Mr. Yasuaki Naito, Director and Deputy Director

of the Regional Cooperation Office of the JPO International Cooperation Division, and Mr. Kenji Kainuma, Industrial Property Attaché for South and Central America of the Japan External Trade Organization participated in the session.

of coordinated working in this area and the need to establish mechanisms for collaboration and cooperation on relevant initiatives.

The participants stressed the value and importance of creating inter-regional cooperation links and congratulated WIPO for this initiative.<sup>18</sup>



Mr. Katsura gave a presentation on the main themes and prospects for JPO cooperation with Latin American countries. He also provided details on past and current challenges faced by the JPO, mainly in digitalizing its processes and services.

This was followed by a round table discussion during which the Japanese delegation and the office heads exchanged views on best practices for incorporating tools to support examination work, process management, administrative procedures and services, in particular for patents and industrial designs.

During the round table, the participants also discussed the challenges and problems faced by offices in developing and implementing AI tools, the importance





# Day 2 Continuation Workshop



On the second day of activities, the model was changed from rotation to central moderation in order to cover all the subjects included in the original table and to give countries the opportunity to openly share their concerns and present their point of view on the different subjects in the time allotted for the activity.

This variation made it possible to assess the extent to which countries had the same challenges and to pinpoint which countries needed support in particular areas, so that countries with relevant capacities could formulate proposals and share their experiences. During these interventions, needs and capacities for collaboration were presented, with a perfect match being achieved in some cases.

### *Exchange activity coordinated by a moderator*

The procedure for the next activity was explained before starting the second part of the forum:

The requests and offers collected in the April survey were read in detail;

The moderator then asked the participants which countries wished to speak; and

Countries with experience and good outcomes in the respective area then intervened to offer support and share their experiences.

The possible cooperation initiatives are recorded in the corresponding table to make clear which countries can be contacted if a country implements any of the initiatives and plans mentioned during the meeting.

The work carried out for each subject is detailed below. 20

# 1. Infrastructure and new technologies



For IP offices in the region, this is one of the issues that requires special attention. They all recognize the clear challenge that they face today in terms of the capacity required to **respond in a timely fashion to the demands** of the users of the IP ecosystem, and to adapt to the challenges posed by the **digitalization** of the management of the processes and services offered.

This **need is shared by all the offices**, which generally **request support** to develop tools to help them manage IPRs and/or to improve their current services to the public. They also **request support** tailored to their respective development level for the following **tasks**:

## Document digitization

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## Adaptation/modernization of rights processing procedures

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**Implementation of IT solutions (industrial property administration system, or IPAS)** and other solutions, including cloud solutions.

Other specific needs should also be noted ([details in the table](#)).

The importance of **developing and/or promoting access to technology** that facilitates trademark and patent filing

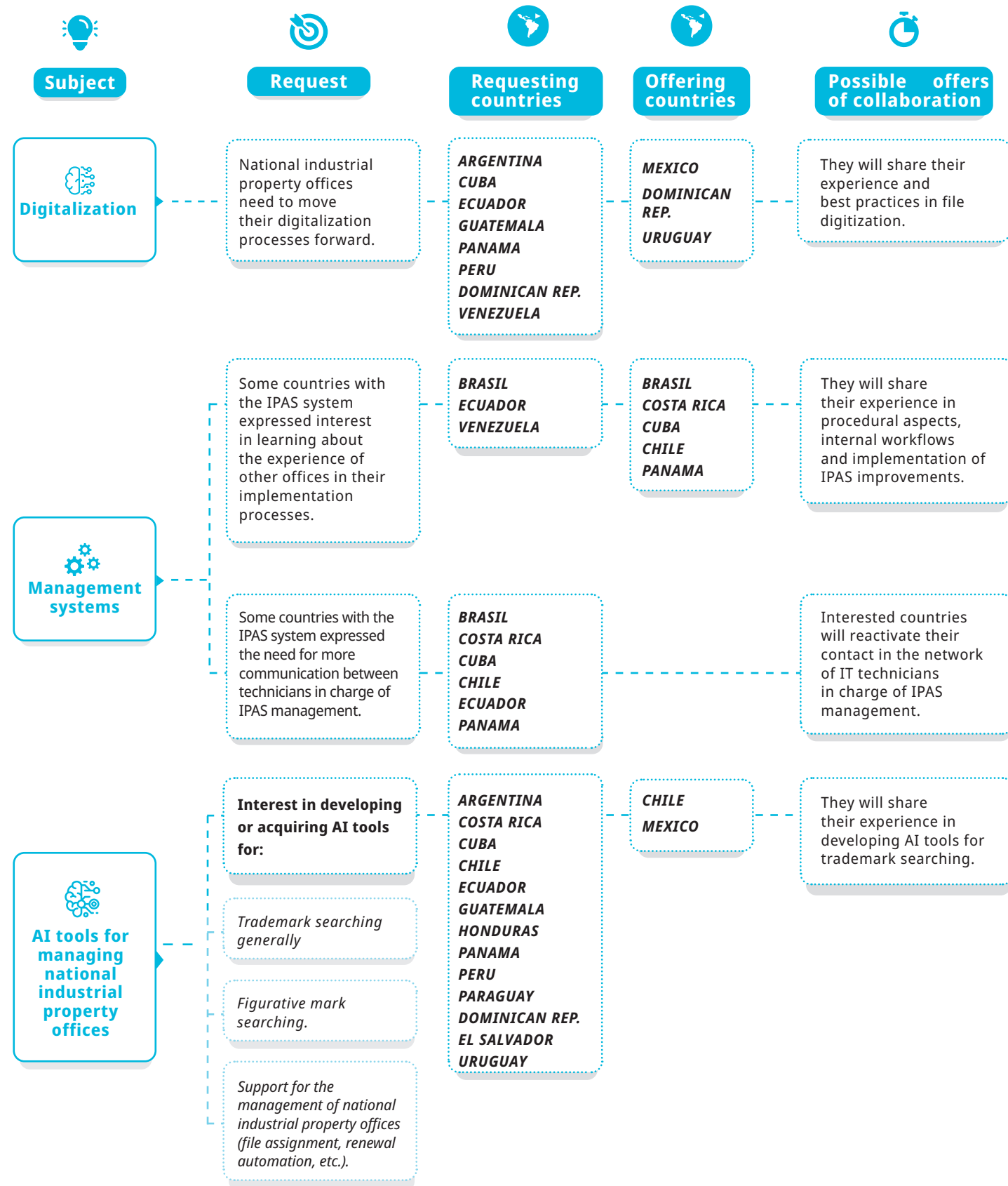
and examination, incorporating **AI-based solutions**, was stressed.

In this regard, the importance of **establishing links** with offices of developed countries in Europe, North America and Asia and facilitating access to and/or the implementation of available and/or future WIPO global AI-based tools was mentioned.

In general, countries expressed a great willingness to share their practices and experiences with others in the region. **Brazil, Chile, Costa Rica, Cuba** and **Panama** offer their support to implement workflows and optimize the implementation of IPAS and other WIPO solutions.

In the same vein, **Cuba** suggested considering the possibility of establishing a **network of IT technicians of the IP offices** to facilitate interactions between technicians and thus provide solutions quickly and efficiently, as well as to promote regional cooperation

## Infrastructure and new technologies



# 2. Management, Enforcement and Building Respect for IP



### A) Management

In relation to IP office management, several office heads participating in the general forum meeting recalled the **importance** of taking into account the **impact** of the mobility restriction measures imposed during the COVID-19 pandemic in the different countries and the operational challenge that this posed for the offices. Undoubtedly, for all offices, this situation involved **changing work plans and modalities**, accelerating remote working and, consequently, reviewing employee goals.

Having managed to perform their work well thanks to digital media and other virtual channels, the return to face-to-face work has been a challenge for some offices because a high percentage of employees prefer to continue working from home.

The **transformation** of current work models is a fact. Offices therefore face the challenge of ensuring productivity through monthly goals or quotas, as some offices are doing, raising the need for **quality indicators** to

determine, objectively, whether the level of work has deteriorated, has been maintained or has increased.

The offices focused on quality as the main indicator to be observed, monitored and managed.

**Argentina, Brazil and Cuba** raised the need to design a quality control system including the establishment of indicators to evaluate IP office management.

**Chile, Peru** and the **Dominican Republic** shared the practices that their offices are currently developing in this area, which have a high impact both internally and in terms of reputation among IP system users.

According to the participants, **productivity** must go **hand in hand with quality**, since there is no point in granting large numbers of patents if they are later annulled or revoked by higher bodies or courts. In conclusion, it was proposed that this matter should be a **cross-cutting issue** for possible **regional collaboration**, as it was a topic of interest

to many countries. The aim is to establish quality indicators in order to draw up annual management plans for the offices of the region.

**Brazil and Cuba** expressed the need for **productivity, performance and quality controls** to determine the performance and impact of the different areas of the IP offices.

The idea is to **generate data** for decision-making on management in each office. The Dominican Republic has a quality control system in which internal and external audits are conducted annually for user services and for **productivity and quality**, which may be of interest to other offices.



## Management, Enforcement and Building Respect for IP

### A) Management



### B) Enforcement and Building Respect for IP

Regarding **IPR enforcement**, the office heads agreed on the importance of having well-functioning registration offices and of ensuring IPR enforcement in their respective countries.

The offices of **Ecuador, Mexico, Paraguay** and **Peru** have a department in charge of enforcement, whereas most of the offices in the region carry out enforcement through other administrative entities and the judicial system. In view of the highly relevant experience of the offices with enforcement functions, the interested countries offered to **explain their functional structures** and enforcement practices.

In addition, and given the challenge posed by the digital market in terms of IPR enforcement, some offices expressed **interest in learning about** the experience of other countries in relation to procedures for identifying and prosecuting infringements in the digital environment. In this regard, the offices of **Mexico** and **Peru** offered to share their experience in cases related to IP infringement in e-commerce, as well as information on the agreements that they have signed with a well-known online commerce platform.

Another issue of **great interest** in ensuring IPR enforcement in the region is the effective exercise of border measures. In this regard, several offices in the region shared, both in the earlier rounds and in the general forum, their progress in the implementation of border measures. **Chile, Ecuador, Honduras, Paraguay, Peru** and **Mexico** offered to share with interested countries information on how they have managed to coordinate their respective IP offices, customs authorities and police authorities in order to implement border measures effectively, **highlighting**

**the importance of inter-institutional work**, as well as the involvement of the private sector in this area.

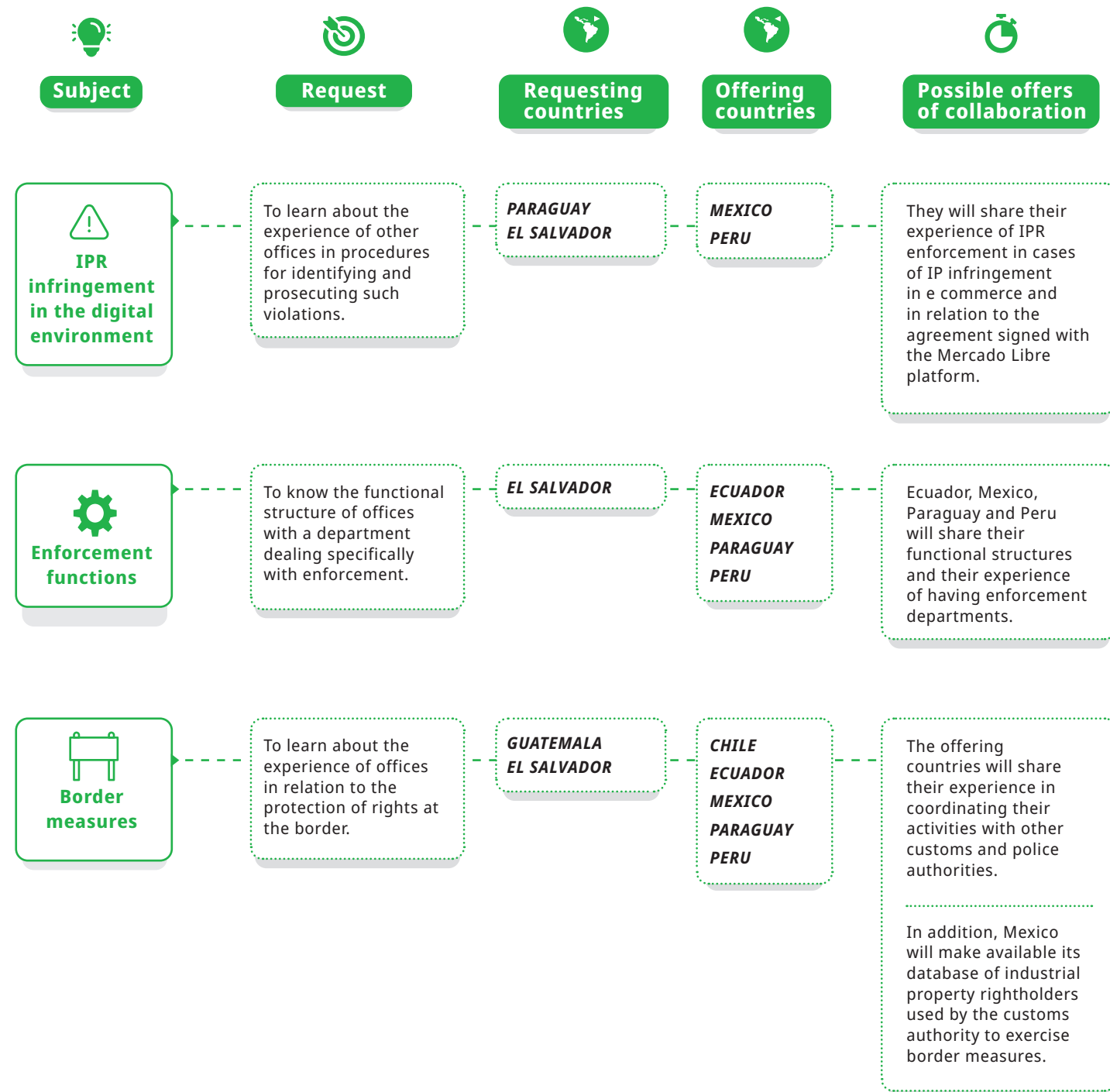
On the same point, **Mexico** also commented on its experience of developing a database of IP rightholders and their agents, which it shares with the customs authority for the exercise of border measures. In addition, Mexico offered to **share information** about the database so that it could be analyzed by other interested countries in the region.

**Peru** and **Ecuador** also offered support and guidance on enforcement issues related to piracy and counterfeiting, based on the work carried out through multisectoral committees and customs agencies.

Lastly, the importance of **maintaining IP training for judges, prosecutors and police and customs officials** to ensure effective IPR enforcement was mentioned.

## Management, Enforcement and Building Respect for IP

### B) Enforcement and Building Respect for IP



# 3. Public Policies

As regards the development of public policies aimed at **boosting and facilitating** the creation, development, management and protection of IP at the national level, an area of particular importance is for IP offices to have data and indicators that enable them to implement information-based **public policy measures**. In this context, the office of **Cuba** highlighted the importance of linking statistical information on IP to economic data and the need to do so, with the aim of **measuring the impact** that IP has or may have on public policies in other areas, such as science, technology and foreign investment.



On this last subject, reference was made to the **Global Innovation Index** published annually by WIPO, and it was recalled that public policy-related aspects are reflected in the indicators of the Index.

Representatives of some offices spoke about needs related to a specific aspect of public policies, i.e., the development of **green patents**. The offices of **Paraguay, Honduras, the Dominican Republic, Chile and Colombia** expressed their interest in this and asked for assistance to make progress in adopting measures and/or strategies to facilitate the management of green patents.

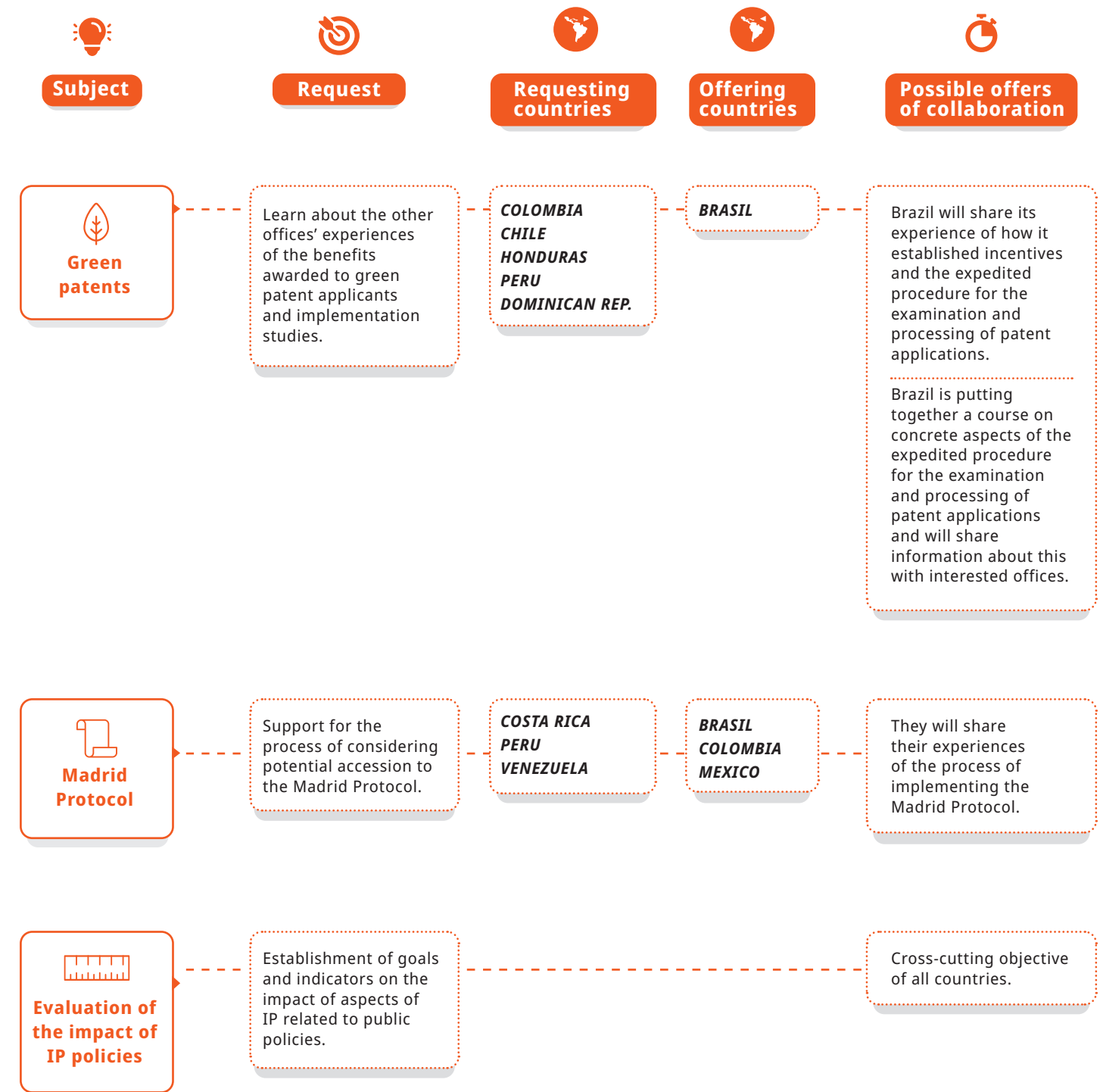
The Office of **Brazil**, for its part, offered to share with the region's offices its experiences of rolling out incentives and implementing an expedited procedure for the processing and examination of green patent applications.

The Office of Brazil also announced that, in the first quarter of 2023, it will be offering an online course to **share** its experience of all concrete aspects of processing and examining applications, and to **raise public awareness** of the importance of green patents and their contribution to society, owing to their value to Latin America as a region rich in biodiversity.

In this connection, it was highlighted that, regarding the development of green patents, there is a fundamental public policy issue concerning how each country defines a green patent and the incentives or stimulus offered to develop relevant inventions.

For its part, the Office of **Peru** shared with the countries in the region its experiences of the **National Invention Competition**, which offered a special prize for green patents. This promotional tool has increased the visibility of this type of invention in Peru.

## Public policies







## 4. Promotion, training and user services



In the preparatory meeting, as well as during the interactions between the office heads in the first part of the meeting, emphasis was placed on the **importance** of business owners and the general public **recognizing** IP offices as entities that drive innovation and competition at the national level, and that provide rights protection services for those who invent, manufacture, market, use and/or consume all types of products.

Also highlighted was the importance of **adopting measures and strategies** that make it possible to raise awareness of IP among the various actors that form

and unite the **innovation, trade and development** ecosystems of different countries. It was noted that it is essential to spread knowledge of IP in the early stages of both primary and secondary schooling and in the first terms of university; this is one of the key strategic areas that must be addressed in the **IP ecosystem**.

In view of the number and scope of the comments in this area, the topics were grouped around the main issues raised in relation to **training and capacity-building, promotion and the provision of services to users**, as detailed below.

## 1. Training

### A) Capacity-building in the field of distinctive signs

On this point, the office heads highlighted that, for the region, it is essential to offer **guarantees** in procedures for **granting trademark rights**, by ensuring that examiners have the requisite capacities and up-to-date information about the examination criteria; in that regard, the exchange of experiences, best practices, and guides and manuals and the process was noted as a **major element for collaboration between offices**. The countries proposed the establishment of a regional training mechanism through inter-office collaboration, which would make it possible to spread knowledge of examination criteria and the practices of each office in relation to the main elements of trademark law.

All the countries agreed that the main area of interest to be addressed under a joint training program would be non-traditional marks. Countries such as **Argentina, Colombia, Guatemala, Peru** and **Uruguay** expressed their willingness to share their experiences in this regard.

### B) Program to enhance the marketing of appellations of origin and geographical indications

**Cultural wealth, the dynamics of innovation and entrepreneurship and the gastronomy** of each region occupy a central place in this regard; the diversity of our peoples and the use of traditional techniques to create unique products require particular attention at a time when a brand, product or service can become known the world over

thanks to advances in telecommunications and supply networks, which are ever more extensive at the global level.

In view of the discussions on this issue and the comments provided the previous day at the World Café round tables, it is clear that this is a topic of great interest in view of the needs (requests) expressed by most countries. This indicates the possibility of carrying out **capacity-building** activities on the protection and management of such distinctive signs, as well as their governance and marketing in the context of the regional and international trade of products, and the capacities that must be created within various public bodies (promotion and/or regulation and control), producers and owners to benefit the **development processes of collective marks, geographical indications and/or appellations of origin**.

The importance of exchanging experiences of successful cases of products protected by collective signs was noted. In their responses to the questionnaires, countries such as **Chile, Mexico** and **Peru** offered their cooperation and raised the possibility of sharing their experiences in this regard; **Colombia** also did so, even though the head of the Colombian Office could not attend the meeting in Lima.

Also highlighted in the discussions was the importance of the Lisbon Agreement and the role that it could play in this context to promote the protection and recognition of the region's geographical indications at the international level. Some countries, such as **Mexico** and **Peru**, expressed their willingness to share their experiences as Contracting Parties to this Agreement.

### C) Industrial designs

It was noted that there is a significant and growing interest in the use of other types of industrial property, such as industrial designs, in the participating countries. In that regard, of particular note was the importance of strengthening the capacities of offices in the region to examine industrial designs, and of receiving additional information about the Hague Agreement (international registration of designs) and mechanisms to promote and disseminate the benefits of protecting industrial designs.

As with other issues, the importance of **sharing experiences** at the regional level was raised. Some countries, such as **Argentina, Costa Rica, Cuba, the Dominican Republic, Ecuador** and **Mexico**, requested the support of those that have developed training programs on the examination of industrial designs, as well as programs to promote the registration of designs, such as the organization of industrial design competitions in **Peru**.

In relation to this issue, **Mexico offered** to share its experience as a State party of the Hague System with countries in the region, and **Argentina** indicated the importance of developing a regional strategy to promote the protection and use of industrial designs.

### D) Examination of patent applications, legal aspects of patent processing and the PCT System

For the region, it is of fundamental importance to continue to develop capacities to examine patent applications in order to improve the quality of examinations and offer better guarantees in the regional innovation process. It was noted that it would be convenient to

establish a detailed view of requirements so as to maintain a training process that allows for **continuous updates** to be made in new and major areas of innovation, both in terms of the technical aspects of the examination and the legal aspects related to the protection of inventions. The main areas in this regard include biotechnology, computer-implemented inventions, graphical user interfaces, the implementation of solutions using artificial intelligence, and blockchain.

**Collaborative training programs** at the regional level and **international cooperation** for their implementation are a key aspect of the development of patent-related capacities in the region. Countries such as **Brazil, Chile, Cuba** and **Mexico** offered their support for training processes for patent examiners. It became clear that there was interest in learning about offices' experiences of implementing programs and/or measures concerning inventions that are the subject of **"green patents"**. **Brazil** expressed its willingness to share its experiences in this area.

**Brazil, Chile** and **Mexico** also indicated that they would be willing to share their experiences of managing and using the PCT System.

### E) Other training-related considerations

A number of office heads spoke about the training and education offered by WIPO to the employees of offices in the region, and **Honduras** referred to the possibility that certification could be provided for the participants in these courses, which would serve as motivation and strengthen the sense of purpose in the offices where they work.

**Brazil, Colombia** and **Mexico** offered to provide training on the process of implementing the Madrid Protocol.



## 2. Promotion

In order to analyze the issue of promotion, the following topics were addressed.

### A) Communications strategies and programs

De forma general, los directores participantes In general, the participating office heads emphasized that it is essential to have promotional strategies and/or programs to ensure that public interest in IP-related issues.

The meeting facilitated an **exchange of experiences** on the initiatives being taken in each of the offices, as well as providing information on the aims of public awareness-raising campaigns.

Noteworthy among the experiences presented was that of the Office of **Venezuela**, which has a presence on various communications platforms (Instagram, Facebook, Twitter, TikTok, YouTube and VenApp) to provide and exchange information with its users more quickly and in real time, and to increase regional contact with potential users of the IP system. It also has online services for the consultation and management of applications for trademark and patent registration and copyright protection.

Other experiences of note are those of **Paraguay** (Creative Festival), the **Dominican Republic** (summer school for students in their final years of high school), **Mexico** (measures and campaigns to disseminate IP, including an online platform for services), **Honduras** (inventor communities) and **Peru** (the educational program "I decide, I respect" ("Yo decido yo respeto"), aimed at public school students aged 11-15 years).

**Chile** recommends holding training sessions to promote IP; the experiences that several countries have already shared on social media could be used to that end. It should be noted that such sessions must be aimed at specific target audiences, using messages and including people with new perspectives who are adept at that means of communication.

The idea of developing communications guidelines on IP issues was raised as a **possible future measure** at the regional level; these could be used as a frame of reference for the development of detailed strategies for countries in the region.

Various participants indicated the importance of offices having an **institutional presence** at business fairs and meetings to raise further awareness of IP.

### B) Build the capacities of SMEs

A major challenge mentioned was collaborating with SMEs to increase their familiarity with IP in order to enable them to become more competitive and better manage risks relating to development and trade in the region. The IP system plays an **important role** in ensuring that training programs for business owners and SMEs are focused on how to protect products and services so as to enable them to increase the visibility and value of their products on the market, differentiate their company and products from the competition, access (technical and/or commercial) information, avoid the risk of using third-party rights and prevent the loss of valuable information, innovations and assets that belong to them.

Countries such as **Argentina, Cuba, El Salvador, Honduras, Peru** and **Uruguay** expressed a particular interest in this issue and mentioned the following topics as priorities for supporting management: support for SMEs to enable them to incorporate IP into their business strategies; and capacity-building in the valuation of intangible assets.

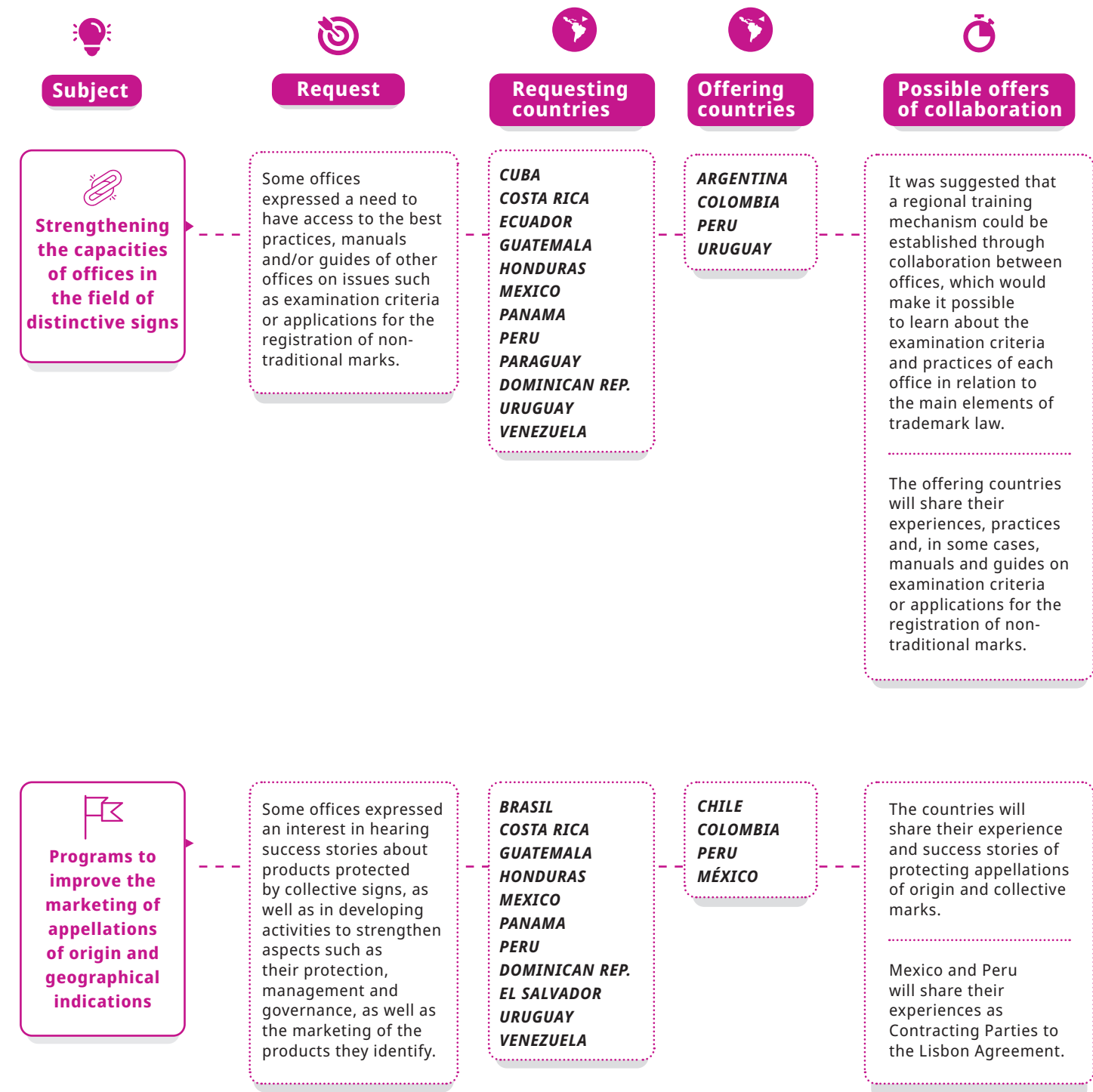
During the sessions, there were discussions on what each country could offer on the basis of its experience; worthy of note in that regard are the experiences of **Brazil** (Inapi), **Ecuador** (how to access remote locations, agricultural or indigenous settlements, etc.), **Peru** (promotion of the use of collective marks in the context of MSMEs) and Honduras (program to establish a business development center for MSMEs by creating links between them and chambers of commerce and industry), among others.

**Cuba** requested timely support for the development of technology-based companies, in the context of its technology parks, so as to ensure that they have IP management capabilities.

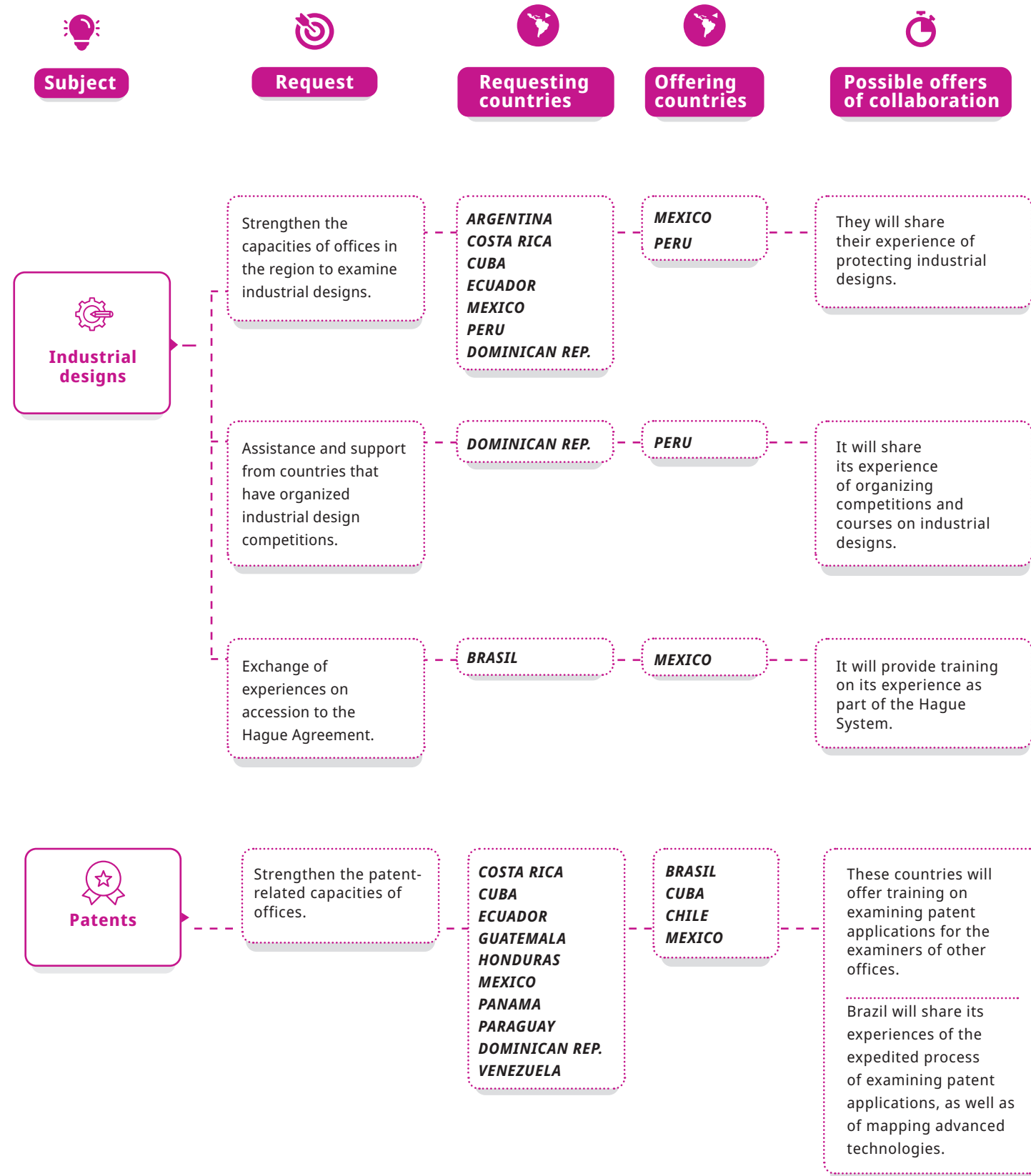
Countries highlighted the importance of Technology and Innovation Support Centers (TISCs) and the role they play in **building capacities and supporting innovation and entrepreneurship in the region**. The importance of having a regional network of TISCs to standardize and promote the exchange of experiences and means of providing support services was mentioned.

Also discussed was the need to offer greater training on issues such as technology transfer and/or the development of business and management models for IP rights.

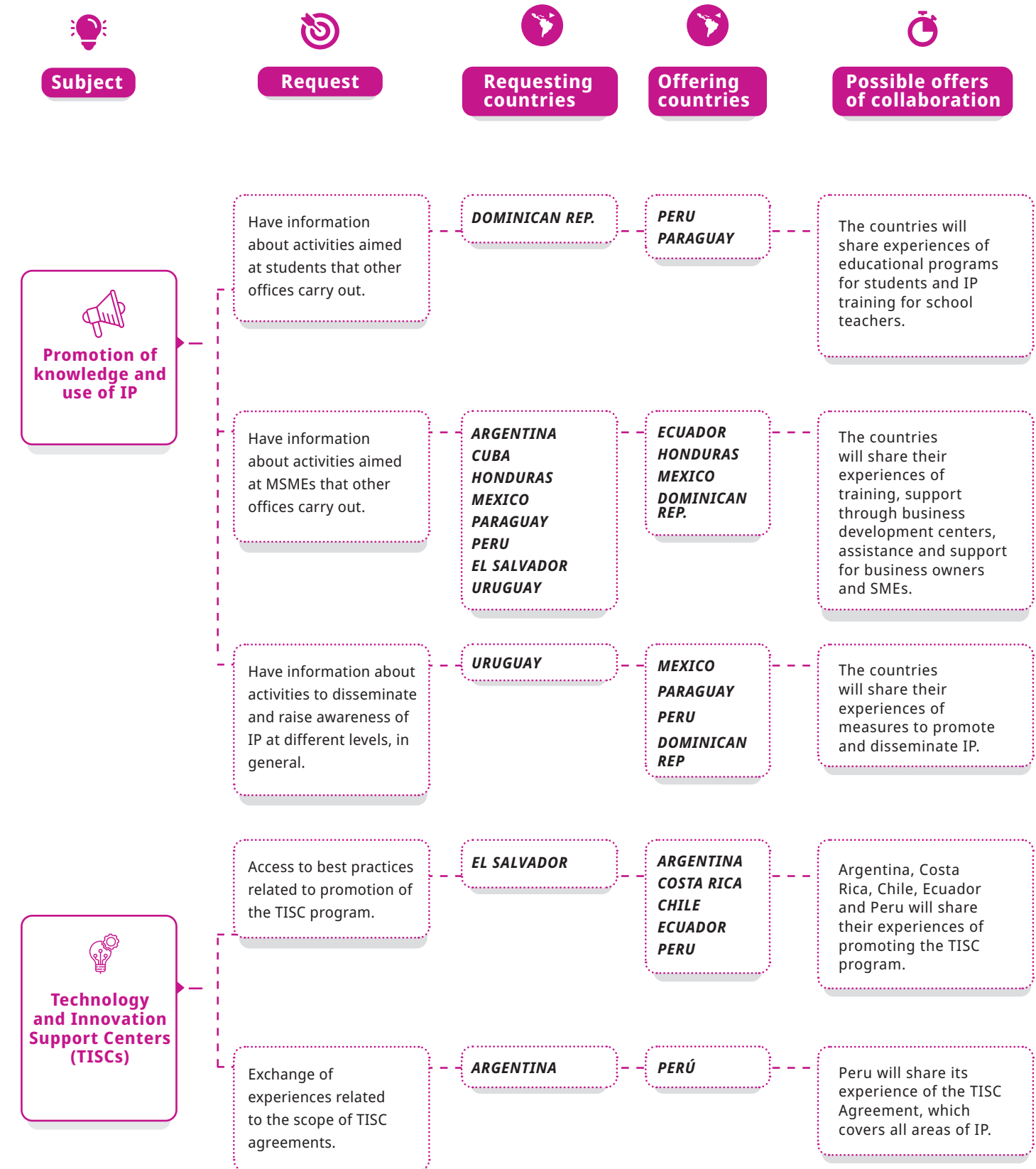
## Promotion, training and user services



## Promotion, training and user services



## Promotion, training and user services



## 5. Collaboration and strategic partnerships

As the **main subject of the meeting**, the table on requests and offers is aimed at highlighting possibilities for future collaboration between countries in the region.



The progress made by many countries on different aspects of IP is undeniable, as seen in their market dynamics and/or innovation ecosystems. Each of their practices, today seen as experiences, constitutes an **invaluable resource** that can be used by other countries, taking into account their learning curves and adapting them to suit their specific requirements as needed.

In the questionnaires used to prepare the meeting, as well in the round table phase and the general forum, some offices specifically mentioned the issues that, in their view, would require the collaboration of other offices in the region.

As a result, the Office of **Mexico** raised the need to obtain assistance to **disseminate and promote alternative dispute resolution mechanisms**. In that connection, the Office of **Chile** mentioned the recent signing of an agreement with the WIPO Arbitration and Mediation Center and the Santiago Arbitration and Mediation Centre, which is in the initial

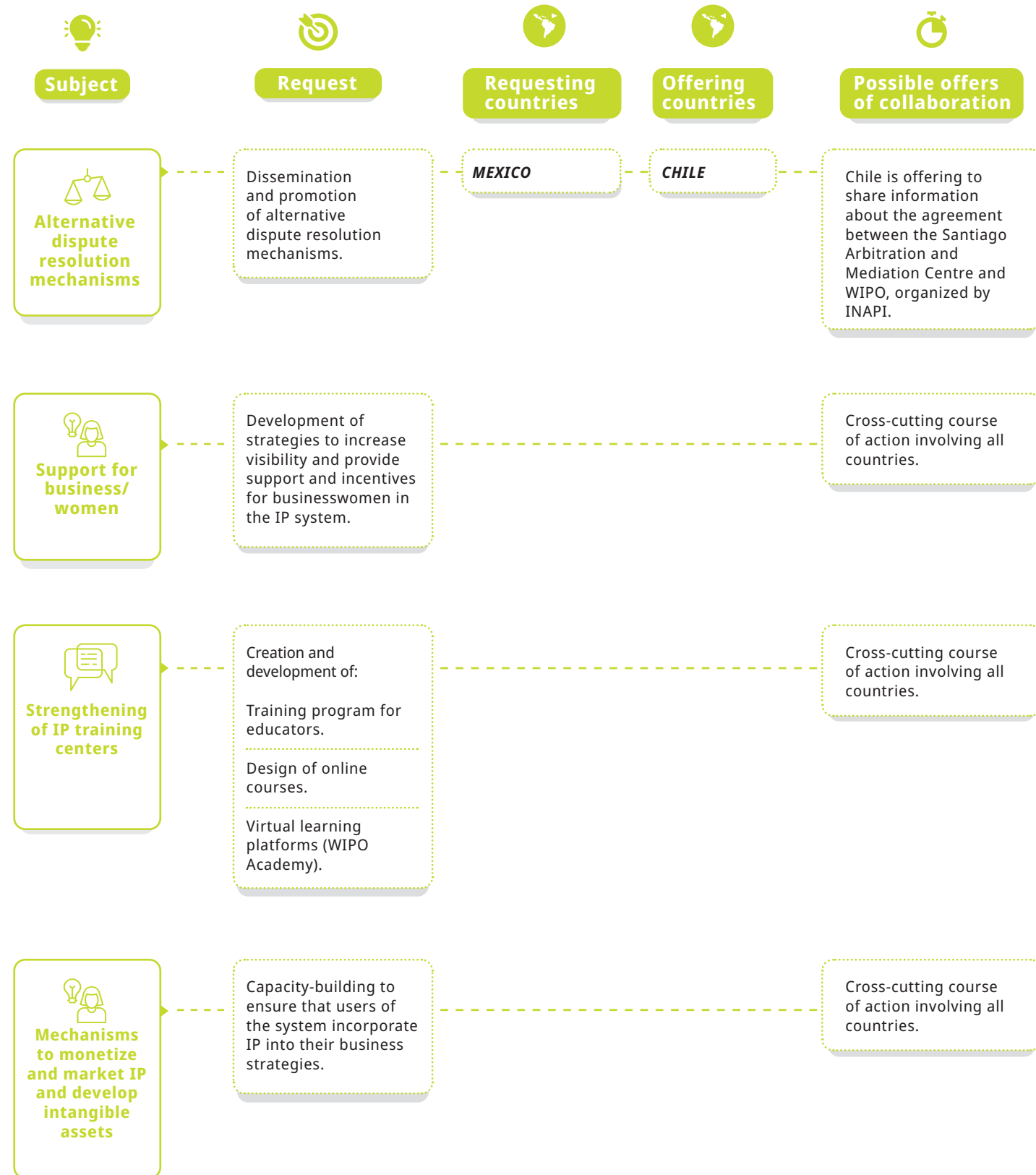
stage of implementation; its progress will continue to be reported in the future.

Meanwhile, in view of the needs initially raised by various offices, agreement was reached on an important area for cross-cutting collaboration in **strengthening IP training** centers with the aim of creating and developing online courses, training programs for educators and more.

In addition, some offices referred to the establishment of mechanisms for the monetization and marketing of IP, the development of intangible assets and capacity-building to ensure that users of the system incorporate IP into their business strategies. In that regard, and taking into account the widespread interest expressed in these issues by offices during the round tables and forums, it was decided that this would also be an area of **cross-cutting collaboration**.

To conclude this area of collaboration, the issue of **gender and strategies to support women**, as raised by various countries, was addressed. It was concluded that this issue must also be the subject of cross-cutting collaboration and reference was made to the creation of the **Latin American Network of IP and Gender**. This Network is supported by WIPO and is aimed at ensuring that IP is a tool that promotes gender equality and the closing of existing gaps, by facilitating the exchange of best practices and experiences between the region's IP offices to enable **development and capacity-building** in this area, thereby creating benefits for both the offices and those using their services.

## Collaboration and strategic partnerships



# Other considerations

Regarding the assessment of intangible assets, there must be capacity-building to enable users of the IP system to incorporate IP into their business strategies and create value that can allow them to obtain financing; this is also a cross-cutting course of action that involves all countries.

Network of IP and Gender and 6 others are waiting to be accepted; we can thereby conclude that a mechanism for collaboration is being established, and it is recommended that this collaborative link be maintained in the table of potential future actions.

As for support for businesswomen, there are currently 10 countries in the Latin American

With these final considerations, the forum was concluded.





# A final word from *the facilitating team*



The meeting was characterized by intense exchanges that produced the desired results. The prevailing mood was of a spirit of camaraderie, critical thinking and in-depth analysis, and the best of intentions to find mechanisms for inter-country collaboration and cooperation, which led to the creation of a plan for future action among Latin American countries.

We could not conclude the event without allowing all participants to express their opinions on the experience of collaboration as a whole. The following are the words to describe the meeting and tell us what they will take back to their home countries:







# Epilogue

The Regional Meeting of Heads of Industrial Property Offices of Latin American Countries, which was organized by the WIPO Division for Latin America and the Caribbean and took place in Lima on October 4-6, 2022, provided spaces for dialogue and frank exchanges on areas of interest linked to best practices in the management of the participating offices and on possible collaborative mechanisms to address the challenges facing the new industrial property ecosystem in the subregional context to drive the transformation of IP offices.

The meeting was shaped by the general considerations, as well as by concrete subjects compiled through prior interviews, questionnaires and discussions; a participatory methodology was used, allowing all country representatives, with a great sense of solidarity and mutual assistance, to have the opportunity to offer support to their peers, while also raising their own needs for collaboration.

The discussions held and the positions formulated over the course of the meeting will act as points of reference for WIPO when defining priorities and cooperation initiatives



Everyone is taking away valuable lessons from this event and they agree that what was successfully created in Lima is A POWERFUL

NETWORK FOR COLLABORATION that can transform IP offices into an example for the entire region.

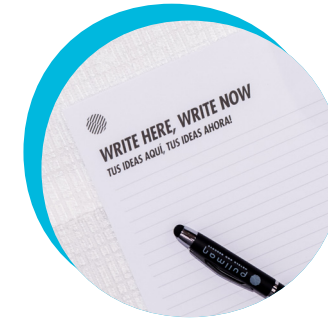
in the regional context. They will also make it possible to establish programs for collaboration between countries in the region to confront challenges and develop solutions in the context of the future modernization and transformation of the region's IP offices.

Owed particular thanks are the heads and delegates of the region's IP offices for having generously shared their valuable thoughts on the ongoing period of transformation and the function of their offices as vital centers of innovation, and for highlighting the needs arising in their countries, which are unique to the specific context of each nation.

Lastly, we would like to express our gratitude to the National Institute for the Defense of

Competition and Protection of Intellectual Property (INDECOPI) for its work organizing the meeting; thanks to the hospitality of its excellent staff, the stay of the delegates and office heads was a transformative and productive experience.

We reiterate once again the commitment of the IP offices to the economic development of their countries and the promotion of innovation and development in the region. We hope that this summary of reflections and ideas on the possible areas and initiatives for cooperation between the region's IP offices contributes to those goals.



# 11. Annexes

**Thematic fact sheets**

**In-depth surveys**

**December 2021 report**

**WIPO questionnaires**

**Table of requests and offers**

2022



# The transformation *of IP offices*

