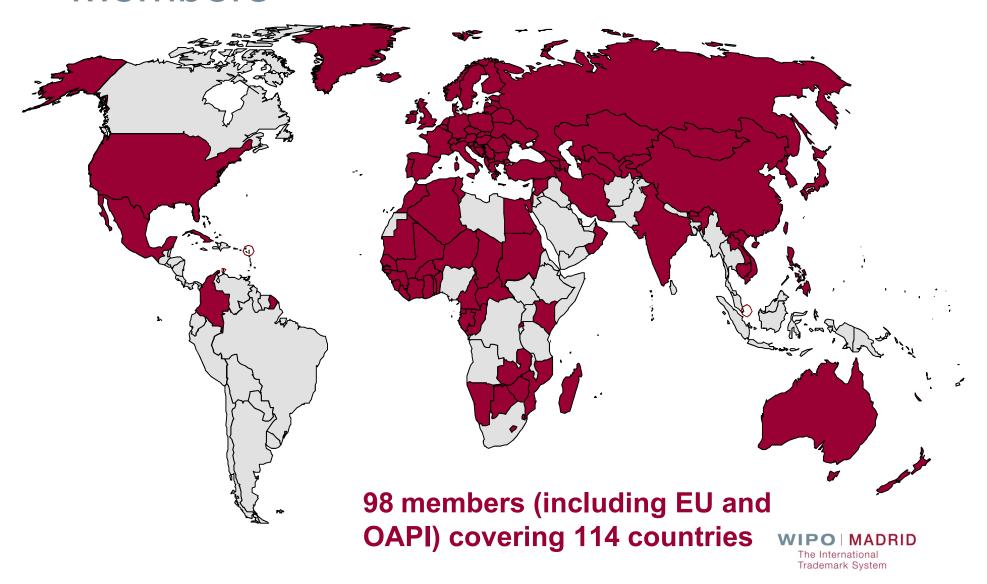


Update on the Latest Development of the Madrid System

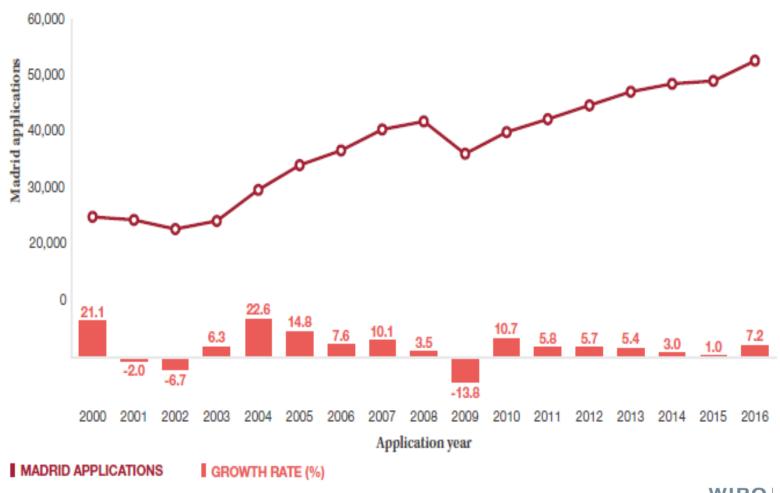
Madrid Working Group Roundtable
June 2017

Marcus Höpperger, Director, Madrid Registry
Ásta Valdimarsdóttir, Director, Operations Division
Roger Holberton, Head, Madrid Information Systems Division
Isabelle Vicedo, Head, Operations Division
Peter Baker, Project Manager, Madrid Information Systems Division
Sara Amini, Project Coordination Officer, Madrid Information Systems Division
Emily Erskine, Information Assistant, Information and Promotion Division

Members



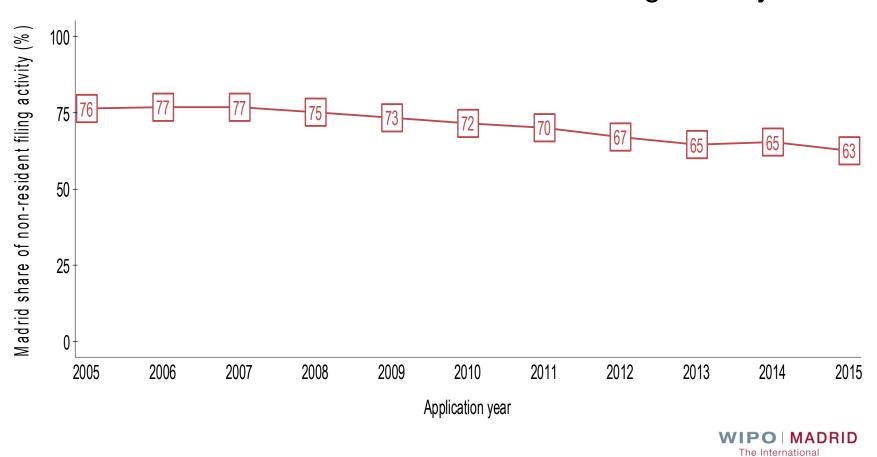
Picking up from 2015's modest increase, Madrid international applications grew by 7.2% in 2016, the fastest since 2010.





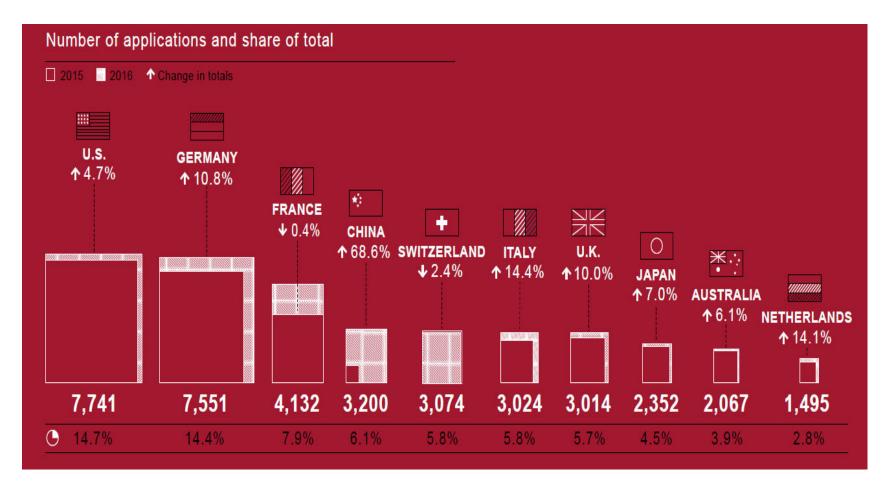
Market Share

Trend in use of the Madrid route for Madrid Origins Only



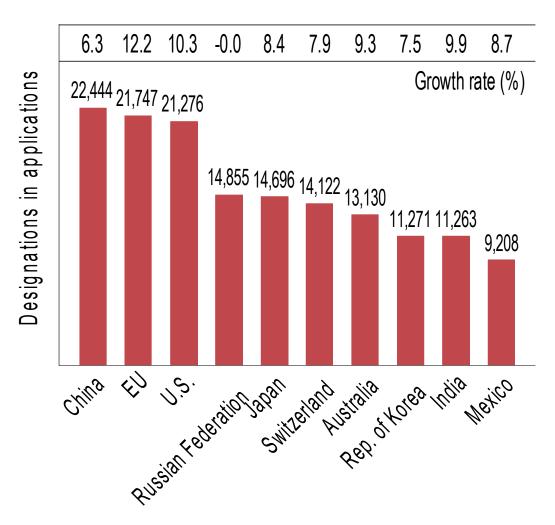
Trademark System

Top Ten Filing Origins





Top Designated Contracting Parties





Ranking	Change in position from 2015	Applicant	Origin	Madrid applications		
				2014	2015	2016
1	2	L'OREAL, SOCIETE ANONYME	France	89	130	150
2	8	GLAXO GROUP LIMITED	U.K.	234	68	141
3	20	BAYERISCHE MOTOREN WERKE AKTIENGESELLSCHAFT	Germany	49	40	117
4	-2	LIDL STIFTUNG & CO. KG	Germany	125	143	112
5	-4	NOVARTIS AG	Switzerland	293	194	94
6	-1	PHILIPS ELECTRONICS N.V.	Netherlands	86	123	85
7	0	BOEHRINGER INGELHEIM INTERNATIONAL GMBH	Germany	90	90	83
8	1	BIOFARMA	France	31	81	75
9	-3	DAIMLER AG	Germany	63	103	70
10	5	SOCIETE DES PRODUITS NESTLE S.A.	Switzerland	115	52	67
11	9	AUGUST STORCK KG	Germany	28	45	62
12	106	BRILLUX GMBH & CO. KG	Germany	17	16	61



Key numbers

Description	2016	Change ¹
Madrid international applications	52,550	+7.2%
Designations in international applications	353,268	+6.2%
Madrid international registrations	44,726	-13.9%
Subsequent designations in international registrations	45,633	-5.7%
Renewals of international registrations	29,546	+2%
Active (in force) international registrations	641,587	+2.5%
Designations in active international registrations	5,688,043	+0.4%
Share of Madrid designations in total non-resident trademark filing activity ² (for Madrid member origins only) ³	63%	−2 percentage points⁴
Contracting Parties (Madrid members)	98	+1 member
Countries covered	114	+1 country

Key developments

- Madrid Monitor
- Madrid Member Profiles
- Madrid Classification Guidelines
- Madrid Goods & Services Manager (MGS)
- E-communications
- Madrid E-filing
- Madrid Office Portal
- Webinars

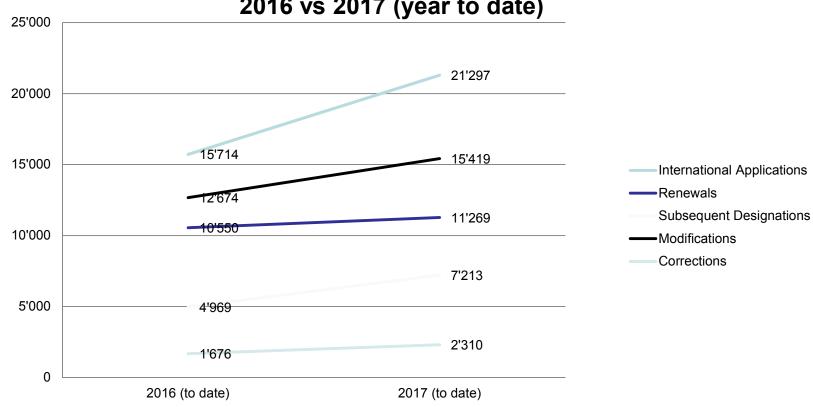


Production and Designations



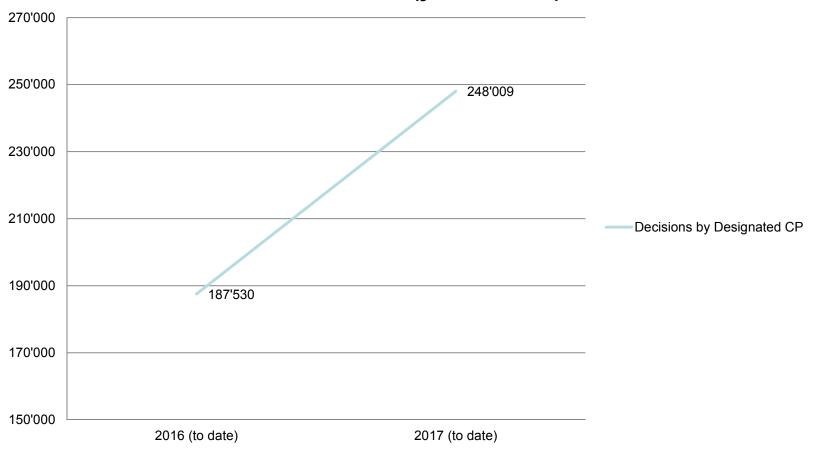
Production figures

File Processed by International Bureau 2016 vs 2017 (year to date)



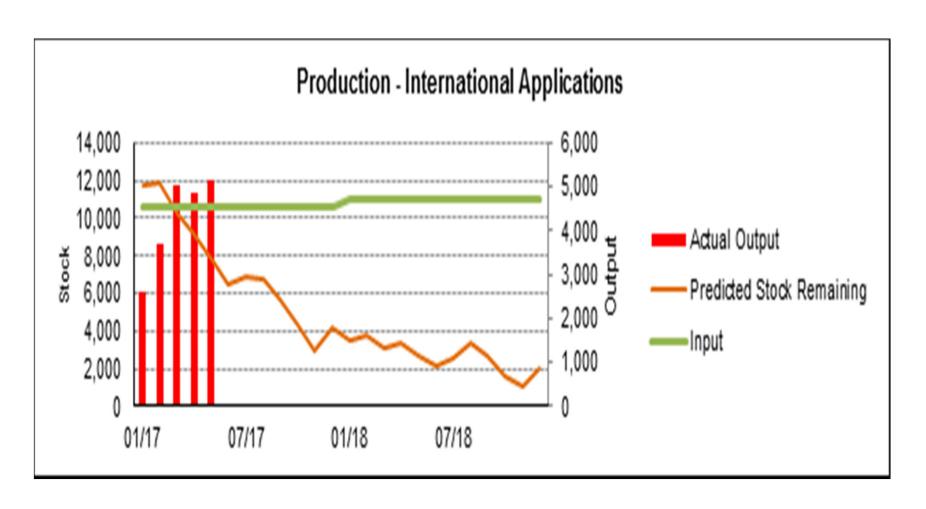


Decisions Processed by International Bureau 2016 vs 2017 (year to date)





Forecasted production





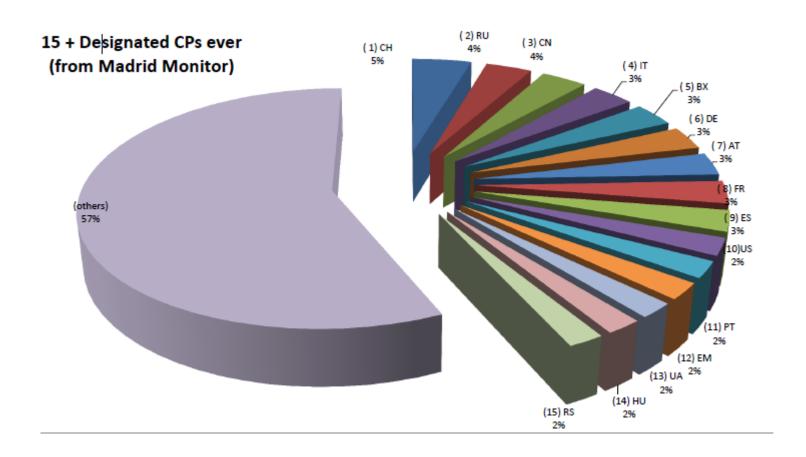
Designations – 10 highest

- **EUIPO**
- China
- USA
- Japan
- Russian Federation

- Switzerland
- Australia
- Republic of Korea
- India
- Mexico



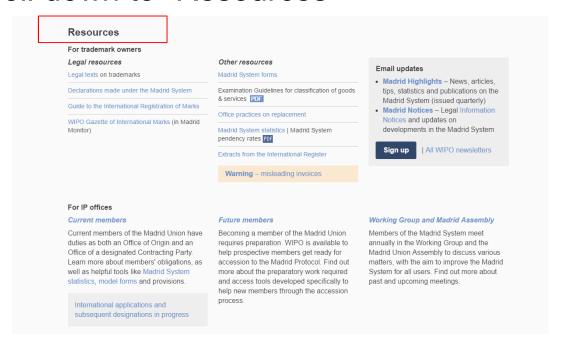
Designations – historical (15 highest)





Access to Upcoming Notifications (1)

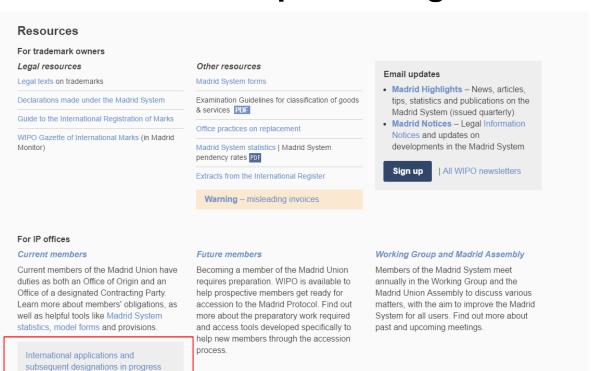
- Access the Madrid homepage:
 - http://www.wipo.int/madrid/
- Scroll down to "Resources"





Access to Upcoming Notifications (2)

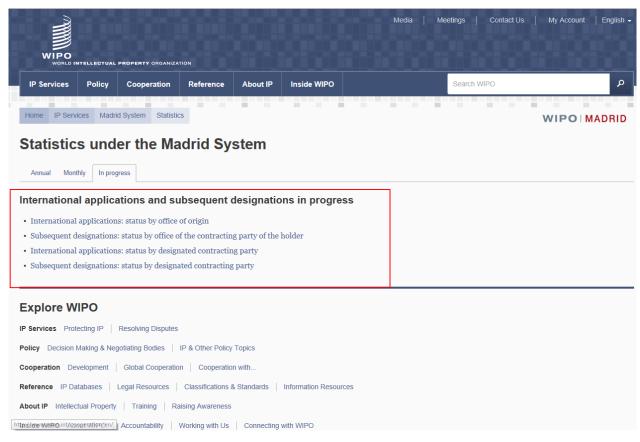
Under "For IP Offices", select International applications and subsequent designations



The International
Trademark System

Access to Upcoming Notifications (3)

Select the relevant statistics you wish to view



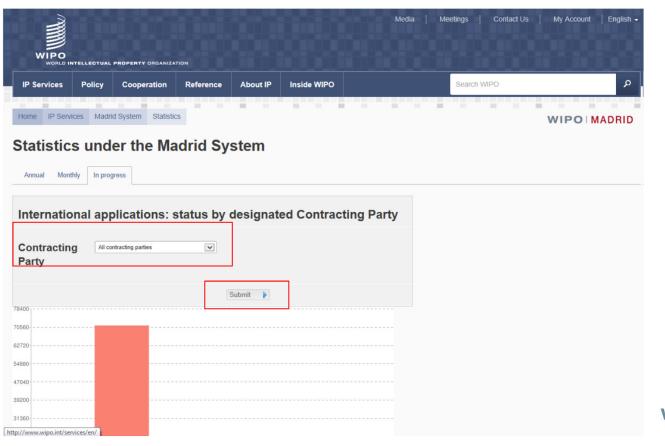
WIPO | MADRID

The International Trademark System



Access to Upcoming Notifications (4)

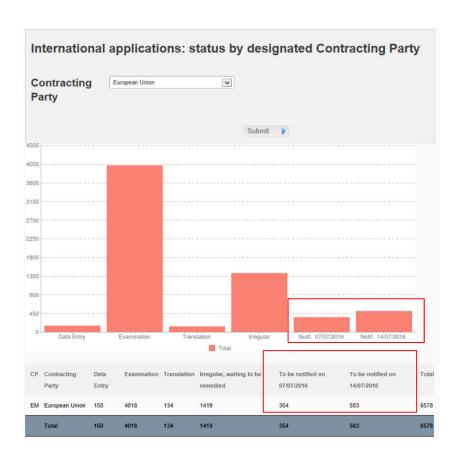
Select your national/regional office and click "submit"





Access to Upcoming Notifications: Example – European Union

■ 503 notifications on 14/07/2017





Communication from IP Offices to WIPO



Topics

- Overview and status
 - Content format channels
- Madrid Office Portal (MOP)
- E-filing
- Communication form



What is transmitted to WIPO

- Applications
- Decisions
- Modificiations
- Answers to irregularity letters
- Questions and queries



Communication channels

- Format
 - XML
 - PDF
 - Paper

- Channels
 - E-filing (applications)
 - Via FTP servers
 - Madrid Office Portal (MOP)
 - Meca (xml)
 - Email
 - Communication form



What's the status? Applications

Applications (MM2)

■ E-filing 2 Members (Madrid E-filing)

■ Electronic 12 Members

■ MOP 22 Members

■ Email/paper 13 Members

Paper 36 Members



The status - Decisions

- Decisions, i.e. Provisional refusals, Grant of Protection, Final Decisions etc.
- Many Offices use several different channels.

■ Electronic 55 Members

■ MOP 33 Members

■ Email/paper 15 Members

Paper 72 members



The status - Modifications

■ Modifications, i.e. limitations, ceasing of effect etc.

■ Electronic 9

■ MOP 21

Paper 61



The status - Replies to irregularities

■ Electronically 10

■ MOP 17

Email/ paper 31

Paper 16



MMIZ(E)

APPLICATION FOR INTERNATIONAL REGISTRATION COVERNED EXCLUSIVELY BY THE MADRID PROTOCOL

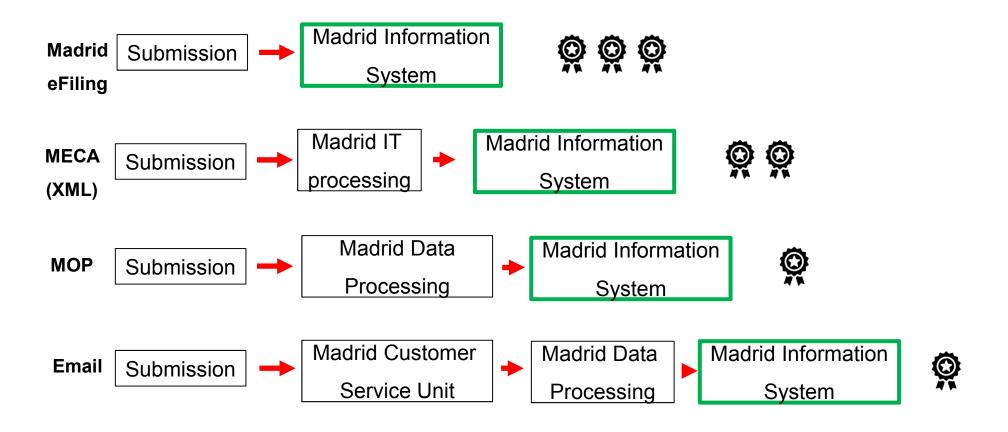
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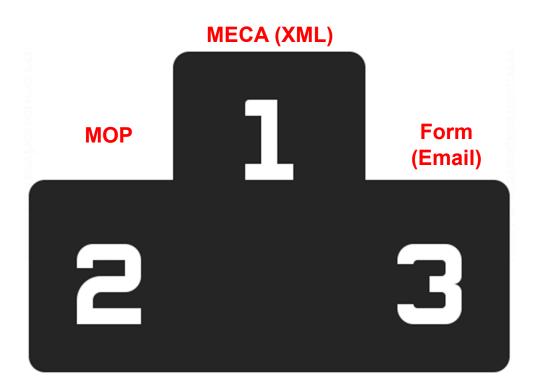
# Flow of information – Speed & Quality difference





### Preferred transmissions channels

#### **Madrid eFiling**





### Advantages of electronic communication

- Speedy transmission
- Low cost saves time and money
- Quality of the data





### MADRID OFFICE PORTAL



### What MOP is

- Online tool designed for National/Regional Offices
- Direct access to the International Register
- Search tool for international registrations status
- Electronic exchange of information with the IB



### Why use MOP

- As an Office of Origin:
  - To collect notifications of Registrations (New applications & Ceasing of effects)
  - To collect Irregularity letters
  - To respond to Irregularity letters
- As a Designated Contracting Party
  - To collect notifications of designations by the IB
  - To upload decisions and forms



#### MOP enhancements

- Possibility to upload multiple documents simultaneously
- Enquire to view what has already been uploaded and retrieve uploaded documents in pdf



#### MOP – How to access

- With a WIPO account
- With an Internet connection
- With a Web browser



#### MOP on the Web





http://www.wipo.int/madrid/en



## MOP – How top open an account

- Create a WIPO Account at <u>www.wipo.int/myaccount/</u> using your Office email address
- Contact: <u>e-marks@wipo.int</u>
- Ask for access to MOP
- Exchange information with the IB electronically





#### MADRID E-FILING



#### What the IB offers

- IPO dedicated Madrid eFiling test environment
- Translation of the Madrid eFiling user interface screens
- Development and integration of a TMview adapter or
- Development and integration with a national/regional Office's own registry (web service search url must be available)



#### What the IB offers

- Option to use WIPO external user authentication services
- Dedicated support and travel during the integration phase
- On-demand WebEx demonstrations



## What an IPO can expect

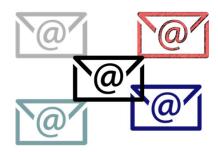
- Ease of use
- Data recycling
- Secure payment
- Expedited processing time



#### **COMMUNICATION FORM**



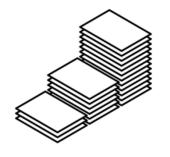
## Challenges - Madrid Registry



Over 5 different contact emails



More queries: >8000 emails/month 4000 phone calls/month



Emails - backlog



#### Communication - form

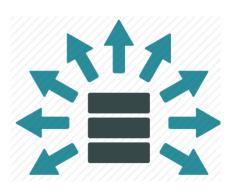




Single point of contact



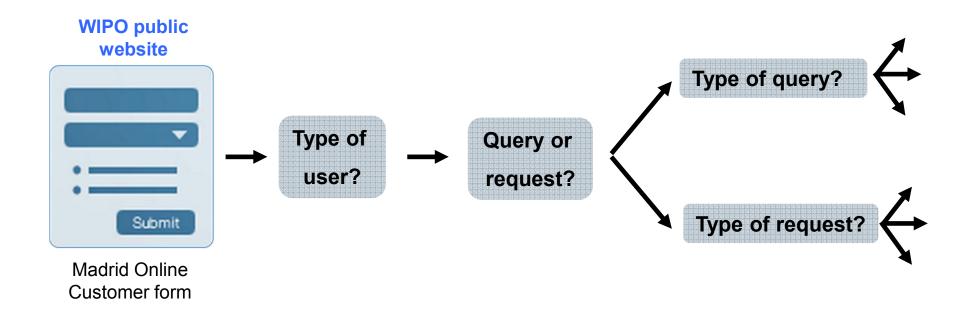
More accurate input data



Quick & automated distribution to relevant team



## Communication form: Conditional Logic





## Communication form - next steps

- > The form has been launched on June 15th
- Replacing the email addresses before 1 of September this year
- ➤ The <a href="INTREG@wipo.int">INTREG@wipo.int</a> email addressed will not be available from September



## Summary

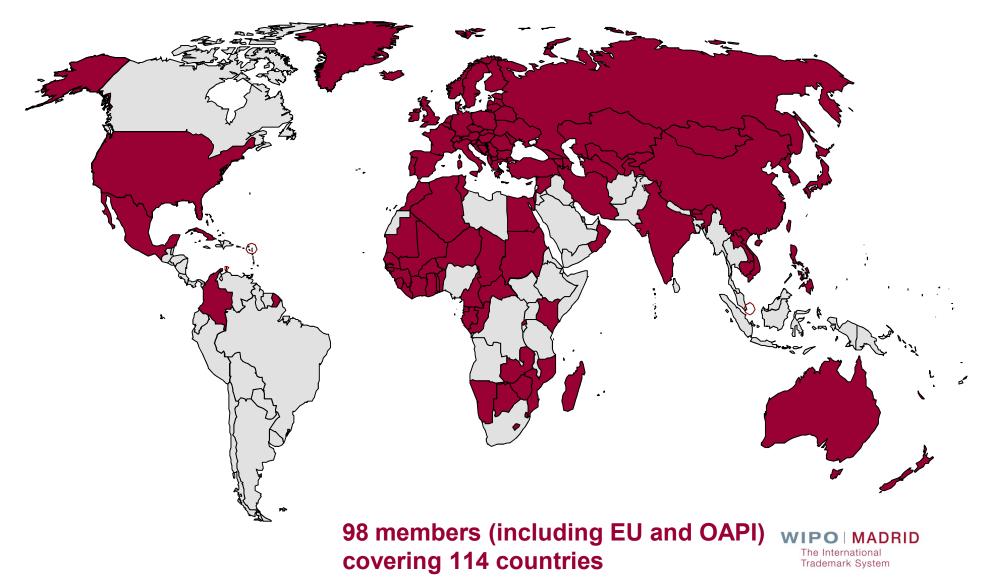
- Improved communication would benefit all stakeholders
- A combined effort IP Offices and the IB
- Different approaches necessary for some time
- Please consider the options
- Contact : <u>e-marks@wipo.int</u> for XML or MOP
- Meet my colleagues Peter Baker for E-filing and Catherine Dupenloup for a MOP account



## **Madrid Member Profiles Database**



### **Madrid Members**



#### New and Searchable

- 2017 New Member Profiles Database (English Only)
  - Richer Content
  - Very Easy to Search
  - Replaced «Country Profiles»
- Features & Structure
- Most Frequently Used/Needed Information
- Cooperation

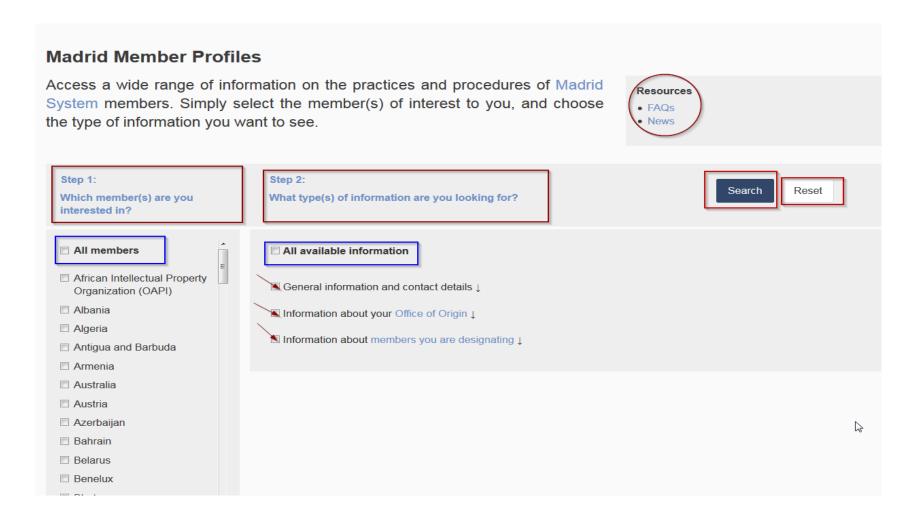


## Features & Structure (1)

- 64 Fields
  - General Information 5 Items
  - Office of origin 3 Items
  - Designated Office 56 Items

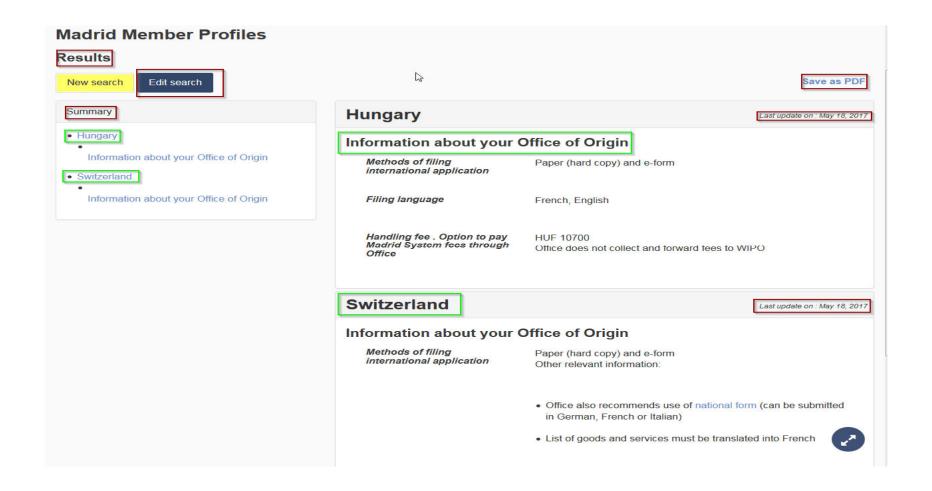


## Features & Structure (2)





## Features & Structure (3)





## Most Frequently Used Fields (1)

- Internal & External Users (Clients)
  - Contact Details
  - Declarations
  - Requirement for Local TM Attorneys
  - Official List of Local TM Attorneys



## Most Frequently Used Fields (2)

- Calculation of time limits
  - ■to respond to RF (either ex officio or based on OP)
  - ■to file & respond to Oppositions
  - ■to request cancellation of a registration due to nonuse of the mark
- Are time limits extendable?



## Most Frequently Used Fields (3)

- Internal & External Users (Clients)
  - Possibility to review or appeal RF + (MM6)
  - Requirements for intention to use the mark
  - Requirements for actual use of the mark with time limits & consequences



## Cooperation

- Check the information about your Office
- Send us
  - Changes in your contact details
  - Legislation
  - Examination practice
- Help us improve by providing feedback



#### Resources

- Madrid Member Profiles
  http://www.wipo.int/madrid/memberprofiles/#/
- Introducing the Madrid Member Profiles Database http://www.wipo.int/madrid/en/news/2017/news_0012.ht ml
- Quick Start Guide http://www.wipo.int/edocs/pubdocs/en/wipo_madrid_memb ers.pdf
- New and Improved Madrid e-Services

  http://www.wipo.int/madrid/en/news/2017/news_0009.htm

# How to use Madrid E-Services Effectively





## SearchFileMonitorManage

#### Online Resources and E-Services

The Madrid System website and customized E-services are available to help you:







## Search

#### Search

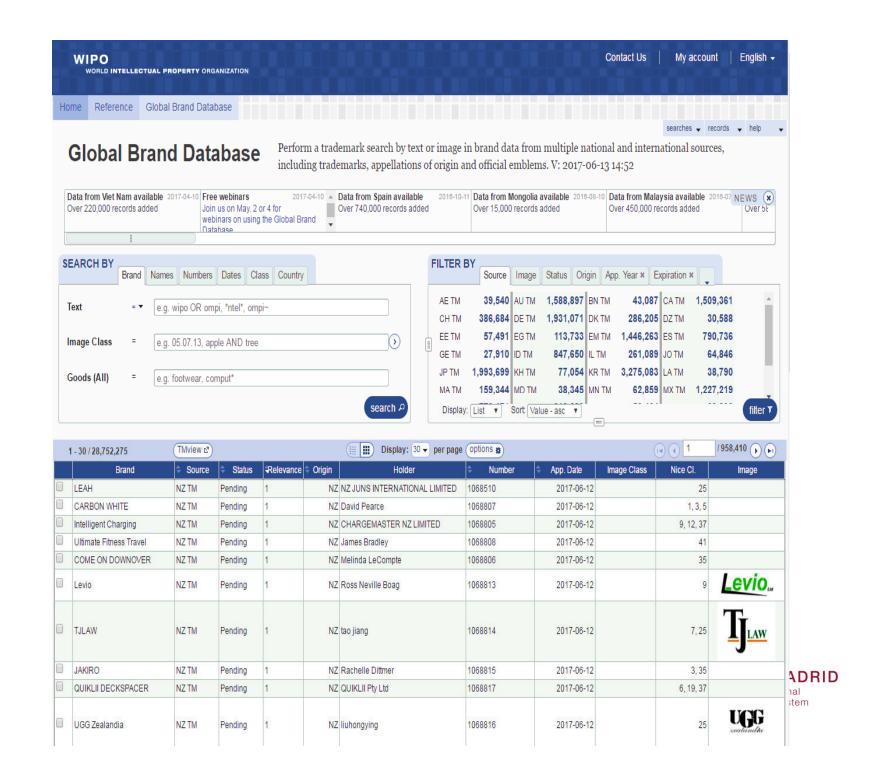


Check if similar marks already exist in your target markets

Start with the Global Brand Database

Access 28+ million records from 35 national and international collections







## **SearchFileMonitorManage**

### File



Madrid Goods & Services Manager



Member Profiles Database



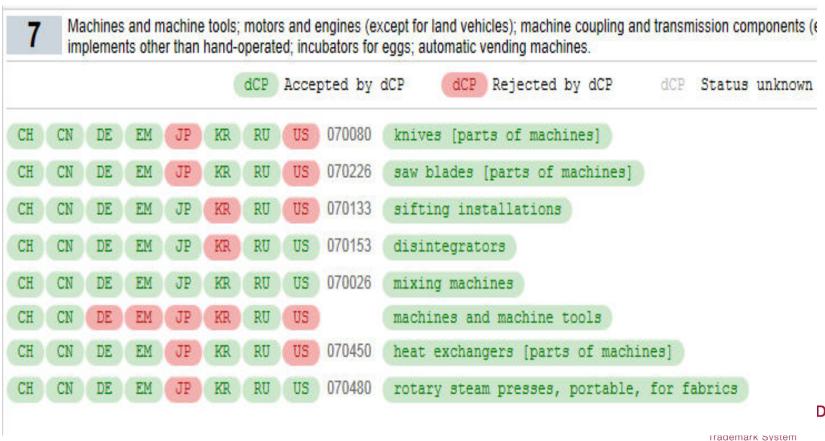
**Fee Calculator** 



### Madrid Goods & Services Manager

Compile and verify your list of goods and services





#### **Member Profiles Database**



Compare trademark rules & examination procedures in the IP Offices of Madrid System members

General information

Filing rules and procedures

Designation rules and procedures



#### **Fee Calculator**



For date:	30.04.2017	• Office of origin:	African Intellectual Property Organization (OAP
Number of classes:	1	Type:	New application
A designation of A designation of Bonaire, Saint E	the European Union the African Intellectu ustatius and Saba (B	vers Belgium, Luxembourg and (EM) covers its 28 Member ste al Property Organization (OA) Q), Curaçao (CW) and Sint Me an be individually designated	ates

Estimate cost for:

- ☐ International applications
- ☐ Subsequent designations
- □ Renewals



#### Home > IP Services > Madrid System > Fees/Fee Calculator International Registration of Marks - Fee Calculation For date: Office of origin: 30.04.2017 Switzerland Number of classes: Type: New application AG Antigua and Barbuda EG Egypt LA Lao People's RU Russian Federation Democratic Republic AL Albania RW Rwanda LI Liechtenstein AM Armenia ES Spain SD Sudan LR Liberia FI Finland AT Austria SE Sweden LS Lesotho FR France AU Australia ■ SG Singapore LT Lithuania AZ Azerbaijan GB United Kingdom SI Slovenia BA Bosnia and SK Slovakia GE Georgia Herzegovina MA Morocco GH Ghana SL Sierra Leone BG Bulgaria ■ MC Monaco GM Gambia SM San Marino BH Bahrain MD Republic of Moldova GR Greece ST Sao Tome and Principe BN Brunei Darussalam ME Montenegro HR Croatia SX Sint Maarten (Dutch BQ Bonaire, Sint Eustatius ■ MG Madagascar part) HU Hungary and Saba MK The former Yugoslav SY Syrian Arab Republic ■ IE Ireland BT Bhutan Republic of Macedonia SZ Swaziland IL Israel BW Botswana MN Mongolia ■ TJ Tajikistan IN India MX Mexico BX Benelux ■ TM Turkmenistan IR Islamic Republic of Iran BY Belarus MZ Mozambique TN Tunisia IS Iceland CN China NA Namibia TR Turkey ■ IT Italy CO Colombia NO Norway UA Ukraine JP Japan CU Cuba NZ New Zealand US United States of KE Kenya CW Curação OA African Intellectual America KG Kyrgyzstan Property Organization (OAPI) CY Cyprus UZ Uzbekistan KH Cambodia OM Oman CZ Czech Republic ■ VN Viet Nam KP Democratic People's ■ PH Philippines DE Germany ZM Zambia Republic of Korea PL Poland DK Denmark ZW Zimbabwe KR Republic of Korea PT Portugal DZ Algeria KZ Kazakhstan RO Romania EE Estonia RS Serbia ☐ Colour Collective mark, certification mark, or guarantee mark Calculate Select All Clear All

WIPO

A designation of the Benelux (BX) covers Belgium, Luxembourg and the Netherlands
A designation of the European Union (EM) covers its 28 Member states
A designation of the African Intellectual Property Organization (OA) covers its 17 Member states
Bonaire, Saint Eustatius and Saba (BQ), Curação (CW) and Sint Maarten (Dutch part) (SX) are autonomous territories of
the Kingdom of the Netherlands that can be individually designated

Basic fee where no reproduction of the mark is in color :	653
Complementary fee : (LV) 1 x 100.00 CHF	100
Australia	
Individual fee (international application):	263
Individual fee per additional class (international application): 2   x 263.00 (Number of classes beyond the first)	526
European Union	
for the second class 1 •	55
Individual fee (international application):	897
Individual fee per additional class (international application): 1 x 164.00 (Number of classes beyond the second)	164
	164

#### Disclaimer

Fee Calculator results are based on information you have provided and the Schedule of Fees in effect at the time the estimate is generated. The estimate is provided for information purposes only. For the most accurate estimate, consult the Fee Calculator immediately before you submit a request or your payment order.



## **SearchFileMonitorManage**

#### **Monitor**

- Monitor the status of your international application throughout WIPO's examination process.
- Once WIPO has registered your trademark, find out when protection is granted or refused in target markets.







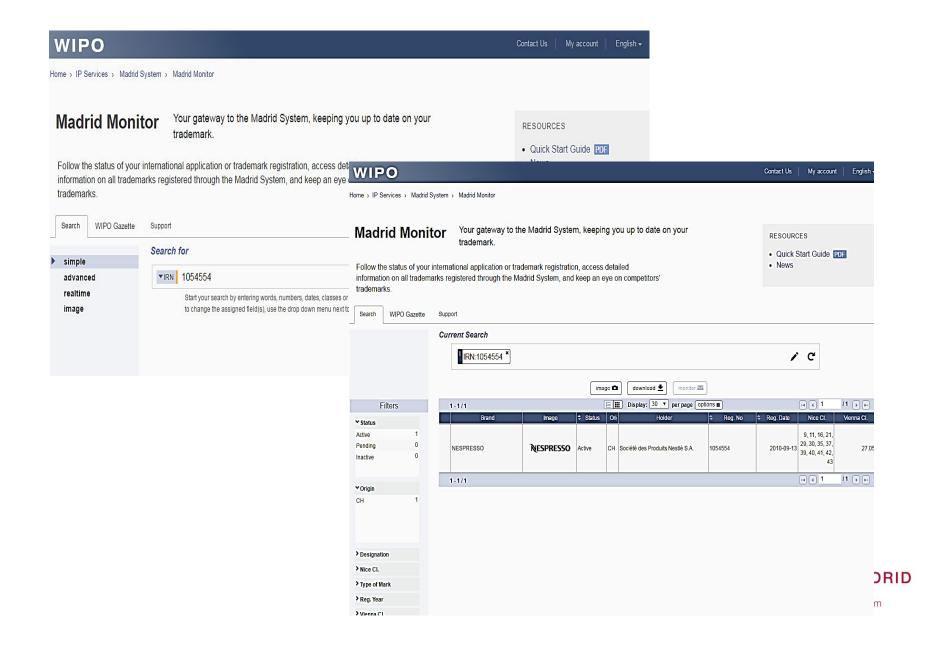


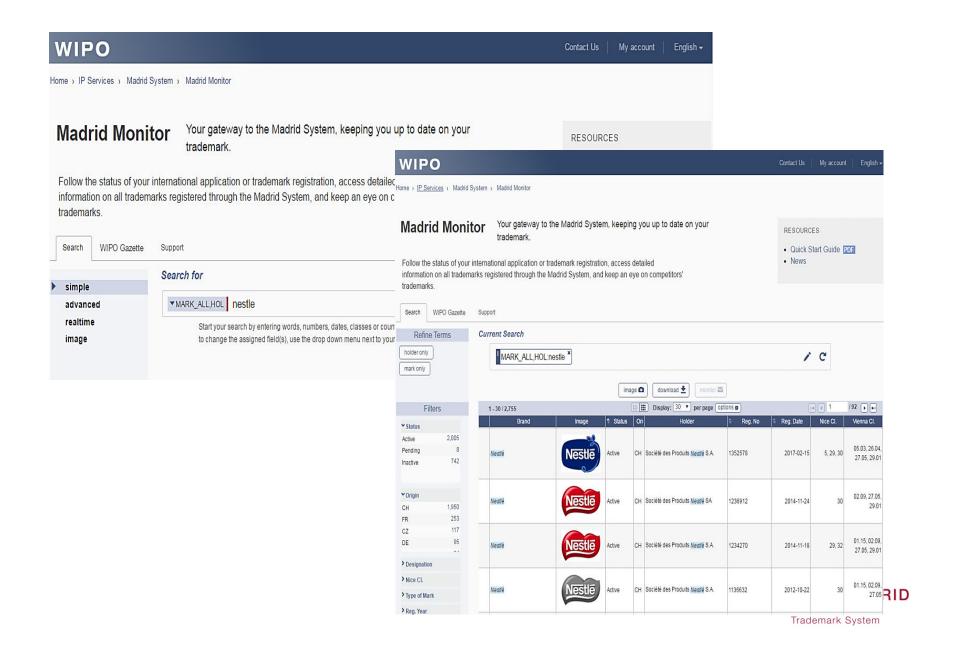


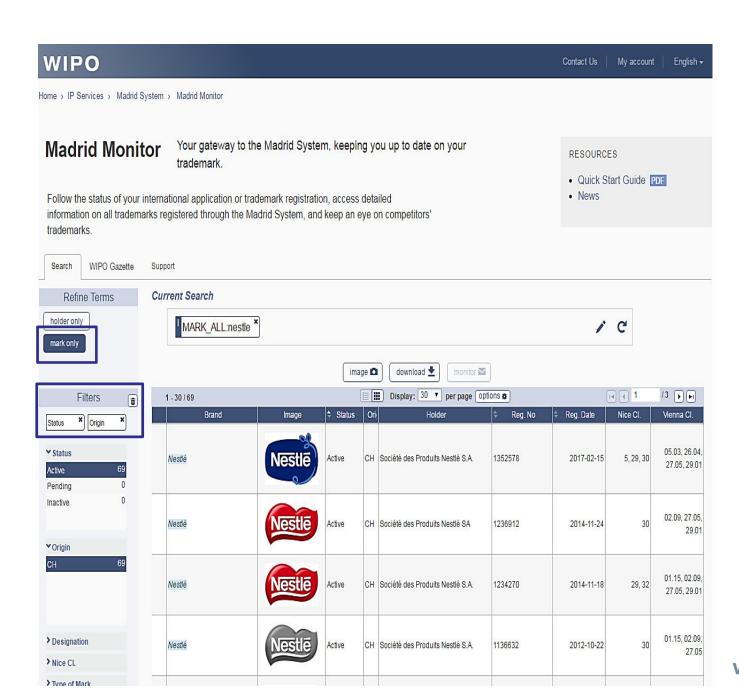
#### **Madrid Monitor**













Home > IP Services > Madrid System > Madrid Monitor

#### **Madrid Monitor**

Your gateway to the Madrid System, keeping you up to date on your trademark.

Follow the status of your international application or trademark registration, access detailed information on all trademarks registered through the Madrid System, and keep an eye on competitors' trademarks.

WIPO Gazette Support Search 5 back

International Trademark

WIPO | MADRID

RESOURCES

- Quick Start Guide PDF
- News

Alert me when document is updated 🛠



#### 1236912- Nestlé

1/68

Full details Summary By Office Documents Realtime Status

#### **Current Status**

- 180 Expected expiration date of the registration/renewal
  - 24.11.2024
- 151 Date of the registration
  - 24.11.2014
- 270 Language of the application
  - French
- 732 Name and address of the holder of the registration
  - Société des Produits Nestlé SA
  - CH-1800 Vevey (CH)
- 812 Contracting State or Contracting Organization in the territory of which the holder has a real and effective industrial or commercial establishment
- 740 Name and address of the representative

RESOURCES

News

Quick Start Guide PDF

Home > IP Services > Madrid System > Madrid Monitor

#### **Madrid Monitor**

Your gateway to the Madrid System, keeping you up to date on your trademark.

Follow the status of your international application or trademark registration, access detailed information on all trademarks registered through the Madrid System, and keep an eye on competitors' trademarks.

Search

WIPO Gazette

Support

The WIPO Gazette of International Marks is the official publication of the Madrid System. Every week the International Bureau publishes data regarding new international registrations, renewals, subsequent designations and modifications affecting existing international registrations.

Browse by chapter

Search by Registration Number or Mark or Holder

Frequently Asked Questions (FAQs)

Publication date

Search

Year All ▼ No. All ▼
IRN 1236912

Holder

Mark

Submit Reset

1-3/3

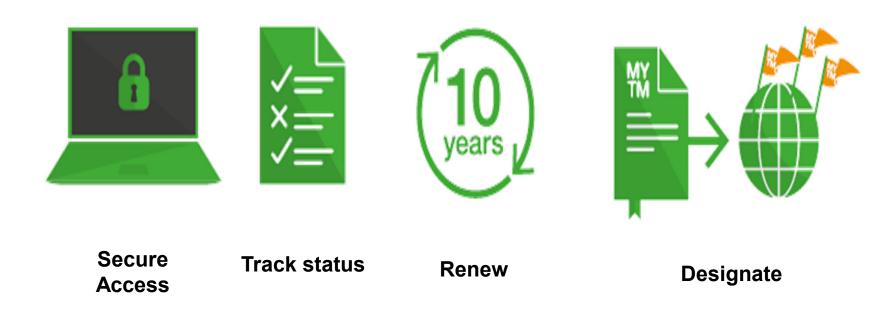
Mark	IRN	Holder	Origin	Transaction	Gazette
	1236912	Société des Produits Nestlé SA		Grant of protection	2015/25
Nestle	1236912	Société des Produits Nestlé SA	СН	Registration	2015/7
Nestlé	1236912	Société des Produits Nestlé SA		Refusal	2016 / 18



## **SearchFileMonitorManage**

#### Manage

Use the <u>Madrid Portfolio Manager</u> as your mark and business evolve





#### **Learn More About Madrid E-Services**

- www.wipo.int/madrid/en
- Support and video tutorials on <u>E-Services</u> page
- Sign up for <u>Madrid Highlights</u>, our quarterly newsletter





# Madrid Goods & Services Manager MGS



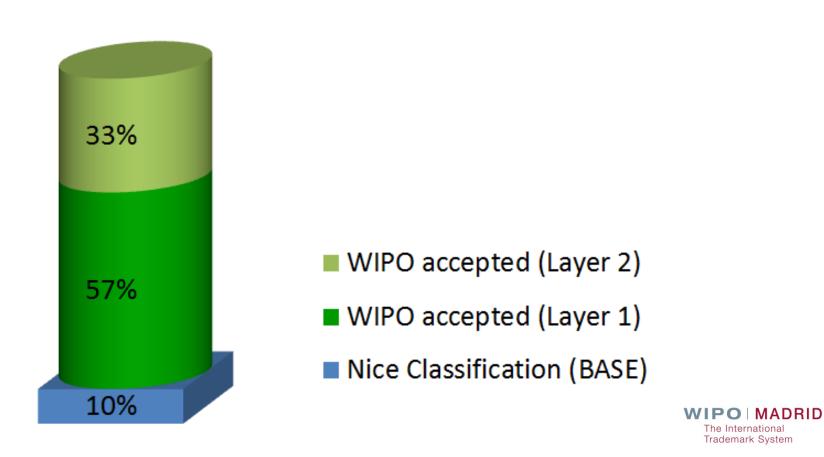
#### What is MGS?

- A gateway to a large and growing database of goods and services
- A tool to compile lists of goods and services required for national or international trademark filing
- A way to save time and money



#### What does MGS contain?

#### 91,000 English terms (May 2017)



Trademark System

## MGS is multilingual



For national filings, choose from 18 languages:

Arabic	Chinese	Dutch	English	French	German
Hebrew	Italian	Japanese	Korean	Mongolian	Norwegian
Portuguese	Russian	Serbian	Spanish	Turkish	Ukrainian

■ For international filings, translate into English, French or Spanish



#### MGS is beneficial



- Trademark applicants
- National IP offices
- International Bureau of WIPO



### MGS - List management functions

Select terms pre-accepted by WIPO:

ski jackets

- □BROWSE per class
- □**SEARCH** using keywords
- TRANSLATE into any of the MGS languages
- PRINT in a format directly usable for filing
- **EXPORT / IMPORT** to save, modify and re-use



## MGS – Madrid-specific functions

**■** Check Acceptance:



- □by WIPO
- □by a designated Contracting Party (dCP)





# Display term in classes: 6; 16; 18; 20; 24 Clothing, footwear, headgear.

labels

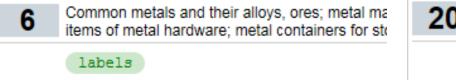


Proposed terms from Layer 1

- 6 labels of metal
- 16 labels of paper or cardboard
- 18 labels of leather
- 20 labels of plastic
- 24 labels of textile



■ Examination flexibility (Layer 2)



- Furniture, mirrors, picture frames; containers, not yellow amber.
- Paper and cardboard; printed matter; bookbinding artists' and drawing materials; paintbrushes; instr
- Textiles and substitutes for textiles; household line

labels

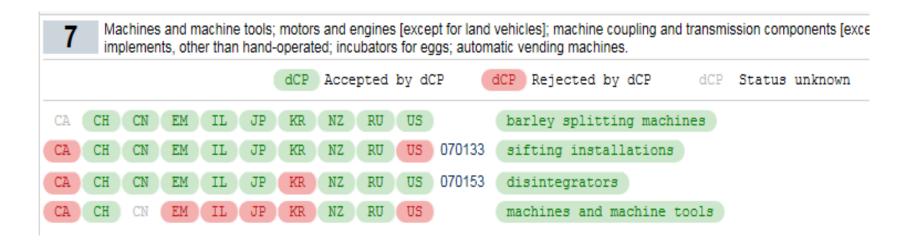
18 Leather and imitations of leather; animal skins ar clothing for animals.

labels



<u>Select all</u> Remove all		
AT Austria BN Brunei Darussalam	☐ EM European Union ☐ FI Finland	NO Norway NZ New Zealand
BX Benelux	GE Georgia	☐ PT Portugal
BY Belarus	GB United Kingdom	R\$ Republic of Serbia
CA Canada *	☐ IL Israel	RU Russian Federation
CH Switzerland	IS Iceland	SE Sweden
CN China	☐ IT Italy	SG Singapore
CO Colombia	☐ JP Japan	TR Turkey
DE Germany	KR Republic of Korea	UA Ukraine
DK Denmark	MN Mongolia	US United States of America
EE Estonia	MX Mexico	☐ VN Vietnam
* Preparing to join the Madrid S	ystem	
	OK	

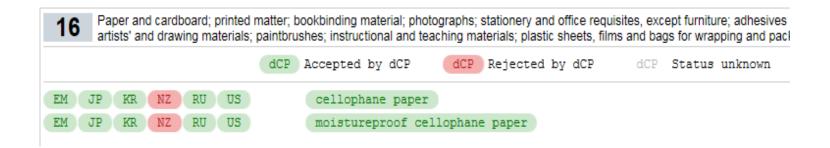
#### Specificity of terms



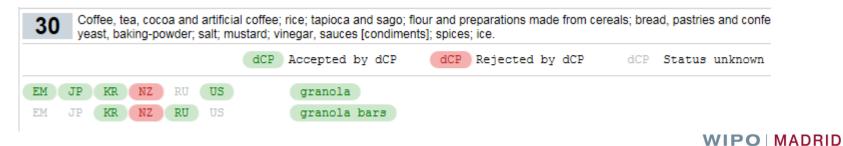


National policies on registered trademarks

"Cellophane" registered in New Zealand

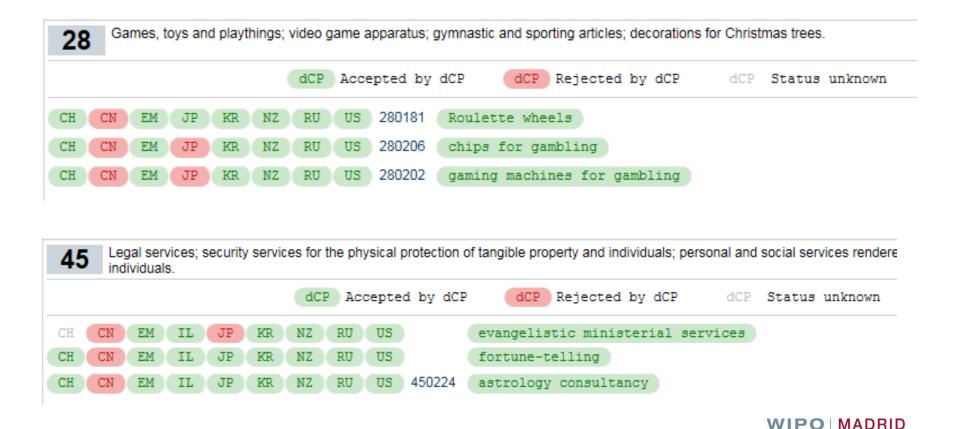


#### "Granola" registered in New Zealand



The International Trademark System

#### National laws /practices



The International Trademark System

#### For more information:

- MGS: <a href="https://webaccess.wipo.int/mgs">https://webaccess.wipo.int/mgs</a>
- Promotional Video: http://www.wipo.int/madrid/en/video/mgs.html
- Comments and questions:
  - ☐ Email: gs.manager@wipo.int
  - ☐ In MGS: Click on the "Contact Us" link



#### **Classification Guidelines**



#### Classification role of the IB

"The indication of classes given by the applicant shall be subject to control by the International Bureau" (Article 3(2) of the Protocol)



#### Classification in the international application

- Rule 9 of the Common Regulations Requirements concerning the international application
- Rule 9.4 (xiii) "the names of the goods and services for which the international registration of the mark is sought, grouped in the appropriate classes of the International Classification of Goods and Services, each group preceded by the number of the class and presented in the order of the classes of that Classification; the goods and services shall be indicated in precise terms, …"



#### Role of the IB

- Check if goods and services in international applications are :
  - grouped in the appropriate classes of the Nice Classification
  - the goods and services are indicated in precise terms
- Rule 12 and Rule 13 of the Common Regulations



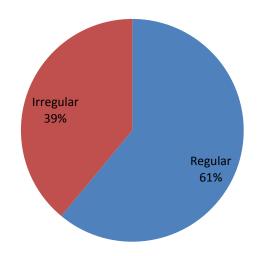
## International Applications - Irregularities

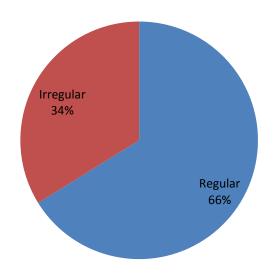
Total Number of International Applications: 49,303

2015

Total Number of International Applications: 52,898

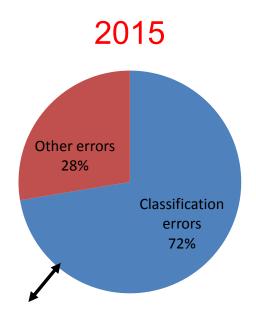
2016







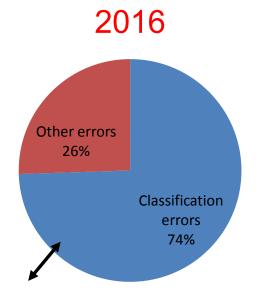
## Breakdown of Irregularity letters



Classification error involving:

R12 - 38%

R13 - 87%



Classification error involving:

R12 - 33%

R13 - 89%



#### "Source" for classification

- Class headings
- Alphabetical list of the Nice Classification
- Explanatory notes to the Nice Classification
- The "General remarks" for G&S in the Nice Classification
- Guidelines on Classification
- Madrid Goods & Services Manager (MGS)



#### Guidelines

- Include only the principles applied by the IB
- Provide general guidance to the users of the Madrid System



### Background

Introduced as a draft to the Members of the Madrid System in the Roundtable on June 17, 2016

For discussion and comments until November 1, 2016



#### Comments to the Guidelines

- 19 Member states
- 2 Associations ECTA and Marques
- Most of the comments related to ;
  - Reference to other classes within the list (2.5.4)
  - Classification of specific goods and services (2.6)
  - Use of trademarks, geographical indications or appellations of origin (2.7)



#### Reference to other classes

#### The Principle is;

- Definitions which are based upon a reference to what is contained in another class may be acceptable
- Cross references are appropriate when a user wants to connect classes for given services to the related goods
- The objective is a clear description for classification purposes



## Examples

- Class 11: Central heating radiators; Airconditioning apparatus.
- Class 37: Installation services in relation to the goods mentioned in class 11.
- Class 31: Fresh beans; Fresh potatoes.
- Class 29: Vegetables other than those listed in class 31.



### Examples

- Class 5: Reagents for diagnostic purposes, antigens for diagnostic purposes; test kits consisting of reagents, antigens and related analysis devices, such as containers for storage and substrates, all for household or professional use.
- Class 10: Diagnostic apparatus for medical purposes.
- Class 44: Consulting and providing information, pertaining to pathologies, drugs and the like and associated diagnostic tests.
- Class 16: Printed documents and user instructions relating to the goods listed in classes 5 and 10 and the services listed in class 44.



# Classification of specific goods and services

- Certain indications of goods and services are more controversial than others
- The IP Offices have different interpretation
- Ten indications highlighted in the Guidelines
- Explaining the practice of the IB



# Classification of specific goods and services

- Manufacturing of goods
  - Manufacturing of goods
  - Custom manufacturing of goods for others
- Wholesale and retail services
  - Wholesale and retail store services Class 35
- Association services
  - Education services provided by an association to its members
  - Association services, namely promoting the interests of its members



## Use of proprietary names

- The principle is:
  - The IB accepts the use of proprietary names (such as trademarks, GIs) in the list of goods and services when it identifies the product for which registration is sought in a manner that is sufficient for its proper classification.



### Use of certain expressions

```
Acceptable expressions;
"namely..."
"in particular..."
"especially..."
"including..."
```

```
■ Not acceptable expressions;

"such as..."

"and the like..."

"etc..."

"all other goods in this class..."
```



### Formatting the list - Punctuation

#### The Principle;

The IB shall not *ex officio* amend the list of goods and services in international applications, as certified and transmitted by the Office of origin, by adding or changing punctuation marks.



## Formatting the list – Capital letters

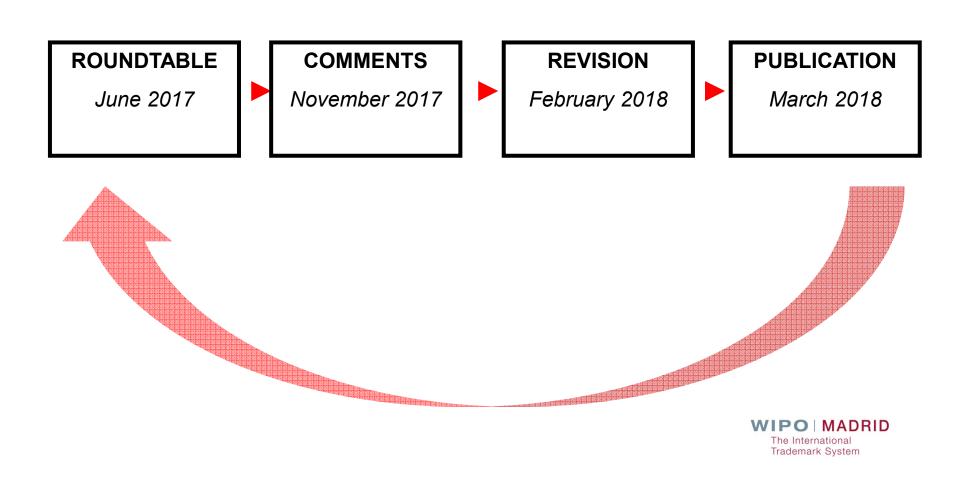
#### ■ The Principle ;

Use of capital letters in a list of goods and services is restricted to the first letter of the good or service of each new class, acronyms and abbreviations.

Lists of goods and services presented in capital letters will be reformatted.



# **Future Updates**



#### Classification Guidelines

Examination Guidelines Concerning the Classification of Goods and Services in International Applications

