Data Exchange with Offices

Hongbing CHEN
Director, Madrid Operations Division
Content

- Progress in 2018
- Importance of Machine-readable Data
- Recommendations
- IB’s support
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Means of document transmission

IP offices → E-filing → MECA → Madrid Office Portal → Contact Madrid (MDU) → Postal → International Bureau → Madrid Office FTP → IPAS → Postal → IP offices
Developed internally with the needs of IP Offices in mind, Madrid eFiling is the Madrid System’s electronic international application interface.
Madrid Office Portal (MOP)

Use Madrid Office Portal to view and manage all the international applications and registrations concerning your IP Office when you are the Office of Origin and when you are a Designated Office.
Contact Madrid

- Gateway of customer support with multiple functions including raising inquiries, upload documents and requesting for e-service support and certified records of the Registry.

- Open to both IP offices and end customers
Industrial Property Automation Solution (IPAS)

IPAS supports the processing of patents, trademarks and industrial designs from filing through to the grant of rights and post-grant processes.
Progress in 2018

- Madrid E-Filing:
  - 7 offices (2 in 2017)

- MECA:
  - 66 offices (55 in 2017)

- MOP + MDU in Contact Madrid:
  - 93 offices in 2018 (43 in 2017)

- IPAS
  - 21 offices

- Postal
  - 94 offices
Progress in 2018
Progress in 2018

- Discontinuation of fax service (April 2018)

- Discontinuation of generic email (July 2018)

- MDU in Contact Madrid by Offices merged into MOP (February 2019)
Progress in 2018

Madrid applications

Application year

Electronics Share (%)

2008 33.6
2009 36.7
2010 38.2
2011 44.6
2012 45.6
2013 52.3
2014 52.0
2015 66.9
2016 73.3
2017 72.1
2018 74.7

PAPER ELECTRONIC
Progress in 2018

SHARE OF DOCUMENT RECEIVED FROM OFFICES

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<thead>
<tr>
<th>Channels</th>
<th>Number</th>
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<tr>
<td>MECA</td>
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<td>MeF</td>
<td>5704</td>
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<td>31030</td>
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</table>
Progress in 2018

FORMAT OF DOCUMENT SENT TO IP OFFICES

- Paper: 9%
- PDF: 5%
- XML: 11%
- Paper + PDF: 20%
- Paper + XML: 22%
- PDF + XML: 32%
- Paper + PDF + XML: 5%

<table>
<thead>
<tr>
<th>File Format</th>
<th>No. of Offices</th>
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<tbody>
<tr>
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<td>PDF</td>
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</tbody>
</table>
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History of the Topic

- 2013: Communication in the Madrid System
- 2014: Communications sent by Designated Offices
- 2016: E-Madrid: Practical Presentation on the Future of Madrid E-Services
- 2018: Communication
From Paper to Paperless

The continuing development of the IT environment for the Global IP Systems will remain a priority in order to improve productivity, to enhance the level of service provided to users, to contain costs and to maintain the competitiveness of the systems.

*WIPO Medium-Term Strategic Plan for 2016-2021*
From Paper to Paperless

Applicant

Basic application/registration “Basic Mark”

Office of Origin

Certifies the international application and forwards it to WIPO

WIPO

Formal examination; registers the mark in the international Register and publishes the international registration in the Gazette. Issues a certificate of registration and notifies the designated Contracting Parties

Office of the designated Contracting Party

Scope of protection of the international registration will be determined by substantive examination under domestic law, within 12/18 months

Office of the designated Contracting Party

Office of the designated Contracting Party
From Paper to Paperless
Document format really matters

- **Machine-readable data** is data (or metadata) in a format that can be easily processed by a computer, such as XML and etc.
Document format really matters

- **Electronic documents** are just digitally accessible documents via computers, but its content is much harder to extract, transform and process via computer programming logic such as PDF, word files, or document as image.
Document format really matters

Plumbs and Water

Image courtesy: http://sncinnovation.com
Document format really matters
Document format really matters

- E-filing
- MECA
- Madrid Office Portal
- Contact Madrid
- Postal

Data Specialist

IB MIRIS
Document format really matters

- Timeliness/reduced pendency
- High quality and less irregularity
- Less human resources cost
- Less infrastructure cost
XML is the best for the Madrid System

Image courtesy: http://sncinnovation.com
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Prioritize XML

**More**
- XML
- ST 96 XML

**Less**
- PDF
- Docs as image
- XLS GP List

**No**
- Paper

Image courtesy: http://sncinnovation.com
Prioritize XML transmission means

More
- E-filing
- MECA
- IPAS

Less
- MOP
- Contact
- Madrid

No
- Postal
- Fax
- Email

Image courtesy: http://sncinnovation.com
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Required efforts on the Office’s part

- Research and feasibility study
- Budget/procurement
- Capacity building
- Workflow re-engineering
- Re-organization of workforce
- Regulations adjustment

Image courtesy: http://sncinnovation.com
WIPO can support

- Madrid E-filing System
  - Dedicated test environment for offices
  - Translation of user interface screens
  - Development and integration with a national/regional Office’s own registry
  - Dedicated support during the integration phase
  - On-demand WebEx demonstrations

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WIPO can support

- MECA
  - Evaluation and feasibility proposal
  - Integration with national IT platform
  - Provision of XML file templates
  - Data test
  - On-demand WebEx demonstrations

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WIPO can support

IPAS

- A key capacity building project of WIPO
- Covers 85 offices
- Madrid Module helps 21 offices in receiving XML data from IB
- Two-way communication test soon

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WIPO can support

- **Best Practice Sharing**
  - Topic shall remain on the Roundtable’s agenda.
  - Thematic activities may be organized in future.

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We appreciate your active and constructive role in shaping the future of the Madrid System!