

## **Committee on WIPO Standards (CWS)**

**Eleventh Session**  
**Geneva, December 4 to 8, 2023**

REPORT BY THE NAME STANDARDIZATION TASK FORCE (TASK NO. 55)

*Document prepared by the Name Standardization Task Force Co-Leaders*

### **SUMMARY**

1. The Name Standardization Task Force is responsible for developing a WIPO standard assisting Industrial Property Offices (IPOs) in providing better ‘quality at source’ in relation to applicant name. The Task Force has completed a final proposal for a set of guidelines on the process of data cleaning of names.

### **BACKGROUND**

2. The Name Standardization Task Force, co-led by the Korean Intellectual Property Office (KIPO) and the International Bureau (IB), was established at its fifth session of the Committee on WIPO Standards (CWS), held in 2017 and assigned Task No. 55, the description of which reads:

*“Envisaging developing a WIPO standard assisting Industrial Property Offices (IPOs) in providing better “quality at source” in relation to applicant names,*

*i. conduct a survey on the use of the identifiers for applicants by IPOs and on the problems, which might be associated with it; and*

*ii. prepare a proposal for future actions aimed at the standardization of applicant names in IP documents and present it for consideration by the CWS.”*

3. At its seventh session in 2019, the CWS noted that the Secretariat had circulated a survey on the use of identifiers for applicants by IPOs in November 2018, as agreed at the sixth session of the CWS. Since the survey on the use of identifiers was completed, the Task Force proposed to revise the description of Task No. 55 by removing the language referring to this survey. The CWS approved the revised description of Task No. 55, which reads:

*“Envisaging developing a WIPO standard assisting Industrial Property Offices (IPOs) in providing better ‘quality at source’ in relation to applicant name, prepare a proposal for future actions aimed at the standardization of applicant names in IP documents and present it for consideration by the CWS.”*

(See paragraphs 72 to 79 of document CWS/7/29.)

4. At its eighth session in 2020, the CWS requested the Task Force to prepare proposed recommendations for improving the quality of applicant data to support name standardization at the ninth session of the CWS.

5. At its ninth session in 2021, the CWS noted the Task Force’s plan to continue gathering data cleaning practices from the Task Force members in 2022 and prepare recommendations for the next session of the CWS

6. At its tenth session in 2022, the CWS noted the progress made by the Name Standardization Task Force. In particular, the Task Force reported its progress in drafting recommendations on data cleaning for name normalization, in support of name standardization. The draft recommendations, which cover general considerations for the intake, processing, clean-up, and publication of clean name data, were at a very early stage and did not reach consensus by the Task Force. Instead, they were presented to the CWS for information purposes and comments. The Task Force reported plans to present recommendations at the eleventh session of the CWS. (See paragraphs 113 to 116 of document CWS/10/22.)

#### PROGRESS ON TASK NO. 55

##### Objective

7. The Name Standardization Task Force indicated its aims, as specified in Task No. 55, as to provide recommendations which are intended to reflect general practices that can be applied by IPOs in support of clean customer data. This in turn supports better name standardization and name matching techniques by downstream users.

##### Relevant Actions for 2023

8. The Name Standardization Task Force planned to finalize the recommendations on the basis of the working draft presented to the tenth session of the CWS. The Task Force discussed it through its Wiki Space and met virtually in September 2023.

##### Potential Challenges or Dependencies

9. The Task Force identified its major challenge in being able to conduct this work, which is the limited participation of Task Force members in the reviewing and improving of the draft document. The proposal for the set of guidelines for the data cleaning of names could be more comprehensive if the Task Force had more interactive discussion.

##### Progress Evaluation

10. The Task Force prepared the final proposal based on the working draft presented to the tenth session of the CWS (see document CWS/10/17) and in light of the comments provided by the Task Force members on this draft. The final proposal is submitted to the present session, as the document CWS/11/23, for consideration by the CWS.

11. The Task Force suggests amending the description of Task No. 55 with the following view:

- replacing the word “Industrial” with “Intellectual” to ensure consistency with the descriptions of other Tasks;
- moving the objective at the beginning of the description; and
- generalizing “applicant names” by removing “applicant” as the names should consider not only applicant names but also other names such as names of holders and legal representatives.

12. The proposed new description of Task No. 55 reads as follows:

*“Prepare a proposal for future actions aimed at achieving the standardization of names in Intellectual Property (IP) documents, with the view to developing a WIPO standard to assist IP offices in providing a better “quality at source” in relation to names.”*

#### WORKPLAN

13. The Task Force will prepare a proposal for future actions and submit it for consideration at the next session of the CWS, taking into account the related activities of Member States, including the Global Identifier pilot project that the International Bureau has been collaborating with several IP Offices on.

*14. The CWS is invited to:*

*(a) note the content of the present document; and*

*(b) consider and approve the proposed amendment to the description of Task No. 55, as referred to paragraphs 11 and 12.*

[End of document]