

Committee on Development and Intellectual Property (CDIP)

Thirty-Second Session
Geneva, April 29 to May 3, 2024

COMPLETION REPORT OF THE PROJECT ON THE REGISTRATION OF THE COLLECTIVE MARKS OF LOCAL ENTERPRISES AS A CROSS-CUTTING ECONOMIC DEVELOPMENT ISSUE

prepared by the Secretariat

1. The Annexes to the present document contain the Completion Report of the Development Agenda (DA) Project on the *Registration of the Collective Marks of Local Enterprises as a Cross-Cutting Economic Development Issue*. The report covers the entire period of the project implementation, from January 2021 to February 2024.

2. *The Committee is invited to take note of the information contained in the Annexes to this document.*

[Annexes follow]

PROJECT SUMMARY	
<u>Project Code</u>	DA_1_4_10_01
<u>Title</u>	<i>Registration of the Collective Marks of Local Enterprises as a Cross-Cutting Economic Development Issue</i>
<u>Development Agenda Recommendations</u>	Recommendations 1; 4; and 10.
<u>Project Budget</u>	Total project budget: 450,000 Swiss francs, of which 325,000 Swiss francs allocated for non-personnel resources, and 125,000 Swiss francs for personnel resources.
<u>Project Duration</u>	38 months
<u>Key WIPO Sectors/areas Involved</u>	Implementing Sector: Regional and National Development Other Sectors involved: Brands and Designs; Intellectual Property (IP) and Innovation Ecosystems
<u>Brief Description of Project</u>	<p>The project sought to convert the national IP Office of the Plurinational State of Bolivia, Brazil, Tunisia and the Philippines into an entity effecting linkages between collective mark registration and local development by supporting small and medium enterprises (SMEs) through the promotion of practices that generate a positive image of their goods, nationwide marketing, links to traditional practices and added value derived from the prioritization of sustainability.</p> <p>The project aimed to establish a “collective mark incubator” involving relevant public and private bodies to assess the technical, financial and market viability of the goods selected provide technical advisory services on trademark protection, and assist in the registration of collective marks.</p> <p>To this end, technical assistance was provided in three stages: i) the identification or creation of an association in each beneficiary country who could benefit from the registration of a collective mark; ii) the development and registration of the collective mark; and iii) the provision of awareness raising and capacity building activities with a view to contribute to its sustainability.</p>
<u>Project Manager</u>	Mr. Georges Ghandour, Senior Counsellor, Development Agenda Coordination Division (DACD), Regional and National Development Sector (RNDS)
<u>Links to Expected Results in the Program of Work and Budget</u>	<p><u>Program and Budget for 2020/21:</u></p> <p><i>ER III. 1:</i> National innovation and IP strategies and plans consistent with national Development objectives.</p> <p><i>ER III. 2:</i> Enhanced human resource capacities able to deal with the broad range of requirements for the effective use of IP for development in developing countries, LDCs and countries with</p>

	<p>economies in transition.</p> <p><i>ER III.6:</i> Increased capacity of SMEs, universities and research institutions to successfully use IP to support innovation.</p> <p>Program of Work and Budget for 2022/23:</p> <p>4.1: More effective use of IP to support growth and development of all Member States and their relevant regions and sub-regions, including through the mainstreaming of the Development Agenda recommendations.</p> <p>4.3: Increased IP knowledge and skills in all Member States.</p> <p>4.4: More innovators, creators, SMEs, universities, research institutions and communities leverage IP successfully.</p>
<p>Overview of the Project Implementation</p>	<p>The following is the overview of the project implementation in each beneficiary country, based on the delivery of the project outputs described in the approved project document (CDIP/24/9). A summary overview of the project is also available in the Catalogue of DA Projects and Outputs at: https://dacatalogue.wipo.int/projects/DA_1_4_10_01</p> <p>Plurinational State of Bolivia</p> <ul style="list-style-type: none">• Team composition and country-level project plan: In October 2021, the country-level project plan was drafted and approved. The Plurinational State of Bolivia designated a local project focal point within the national IP Office (SENAPI) to lead the national project team. Two project consultants were also engaged to provide support.• Scoping study: The scoping study on the potential groups of producers and their products that could benefit from the use of collective marks was prepared in Spanish by the project consultant and completed in July 2022. The scoping study was also made available in English.• Information event: An information event on the potential benefits of the use of collective marks by local entrepreneurs and producers was held on July 8, 2022. Due to the COVID-19 pandemic, the event took place virtually through Zoom to enable the participation of WIPO and the project consultants. The event resulted in the participation of the EMPODERAR program of the Ministry of Rural Development and Land as a member of the national project team.• Product selection and identification/creation of association: The <i>Asociación Regional de Apicultores del Chaco Chuquisaqueño</i> (ARACH), an umbrella association for originally 25 organizations of honey producers in the Chaco Chuquisaqueño region, was selected as the beneficiary for which a collective mark was developed and registered. As a direct impact of this project, ARACH increased its membership to 42 organizations of honey producers from five municipalities in the Chaco Chuquisaqueño region.

- Workshops with ARACH members: A workshop and a field visit took place in Monteagudo from January 25 to 27, 2023, which resulted in the ARACH members agreeing on the final design of the collective mark logo.
- Regulations of use: A local legal consultant was engaged to draft in Spanish the regulations of use of the collective mark, which was subsequently adopted by the ARACH members. The legal consultant also worked on the update and adaptation of the association's by-laws, list of members and internal regulations.
- Logo design: A local supplier was commissioned to design the logo of the collective mark. The logo was finalized in January 2023. A transfer of copyright agreement was then prepared and signed by WIPO and ARACH in November 2023, to officially transfer the copyright over the logo to the association.
- Training for ARACH members (and other local enterprises): An online training on the use of the collective mark for ARACH members was held virtually through Zoom on November 13, 2023. Another training for ARACH members and for other local entrepreneurs and producers took place in La Paz on February 20, 2024. These training activities aimed at building the capacity of ARACH members in the management and use of their collective marks, and addressed, amongst others, the regulations of use, internal governance, quality control schemes, and possible challenges in managing the collective mark.
- Training for SENAPI staff: Two training activities were held virtually through Zoom, with the first on July 25, 2022, and the second on December 15, 2023. A third training was held in person in La Paz on February 21, 2024. These training activities aimed at strengthening further the capacity and knowledgebase of SENAPI staff, and addressed, amongst others, the regulations of use, the legal framework under the Andean Decision 486, and the benefits of collective marks for local enterprises.
- Registration of the collective mark: The certificate of registration was granted by SENAPI on July 31, 2023.
- Launch Event: The Event to launch the collective mark was held in La Paz on February 19, 2024. 18 ARACH members were funded to participate in the Launch Event. The ceremony was attended by high-level representatives from the Ministry of Foreign Affairs, SENAPI and the EMPODERAR program.
- Awareness-raising material: The awareness-raising material developed under this project in the Plurinational State of Bolivia include a practical guide, a promotional leaflet and a short video, in the Spanish language. The short video also contains English subtitles. 500 printed copies of the practical guide and of promotional leaflet were disseminated at the Launch Event and Training that took place in February 2024. The short video was

also shown during the Launch event. All awareness-raising material has been made available on the WIPO dedicated project webpage for [the Plurinational State of Bolivia](#).

Brazil

- Team composition and country-level project plan: In January 2021, the country-level project plan for Brazil was drafted and approved. Brazil designated a local project focal point within the IP Division of the Ministry of Foreign Affairs. The local focal point took the lead in composing the national project team with representatives from the IP Division of the Ministry of Foreign Affairs, National Institute of Industrial Property (INPI) and the Brazilian Micro and Small Business Support Service (SEBRAE). Two national project consultants were also engaged to provide support.
- Scoping study: The scoping study on the potential groups of producers and their products that could benefit from the use of collective marks was prepared in Portuguese by the national project consultants, and completed in June 2021. The scoping study was also made available in English.
- Information event: An information event on the potential benefits of the use of collective marks was held in Flona de Tefé, from July 5 to 6, 2021. Due to the COVID-19 pandemic, WIPO's participation was covered by the two national project consultants. The two-day event included a field visit to the production sites of the selected association.
- Product selection and identification/creation of association: The *Associação dos Produtores Agroextrativistas da Floresta Nacional de Tefé e Entorno (APAFE)*, located in Tefé and Alvéraes of the Amazon region, was selected as the beneficiary for which a collective mark was developed and registered. Its members produce cassava flour and derived products, honey, nuts and oils, among others.
- Workshops with APAFE members: Two workshops on collective marks were held on September 13 and November 8, 2021. The first workshop focused on defining the list of goods to be covered by the collective mark, the regulations of use of the collective mark, and the logo. The second workshop aimed at finalizing and filing the collective mark application. Due to the COVID-19 pandemic, WIPO's participation in both workshops was covered by the two national project consultants.
- Regulations of use: The regulations of use of the collective mark were drafted in Portuguese by the national project consultants and subsequently adopted by the APAFE members. In addition, a control plan for the collective mark was prepared.
- Logo design: A local supplier was commissioned to design the logo of the collective mark. The logo was finalized in November 2021. A transfer of copyright agreement was then

prepared and signed by WIPO and APAFE in March 2022, to officially transfer the copyright over the logo to the association.

- Training on collective marks: A training on the use of the collective mark for APAFE members was held in Tefé, on April 4, 2022. Due to the COVID-19 pandemic, WIPO's participation was covered by the two national project consultants. The training aimed at building the capacity of APAFE members in the management and use of their collective marks, and addressed, amongst others, the regulations of use, and quality control schemes.
- Registration of the collective mark: The certificate of registration was granted on January 17, 2023.
- Launch Event: The Event to launch the collective mark was held in Manaus on March 30, 2023. A field visit to Tefé was also organized to discuss with the APAFE producers about the future use of their collective mark.
- Awareness-raising material: The awareness-raising material developed under this project in Brazil include a practical guide, a promotional leaflet and a short video in the Portuguese language. The short video also contains English subtitles.

The practical guide is available at:

www.gov.br/inpi/pt-br/central-de-conteudo/publicacoes/CartilhaMarcasColetivas_SebraeNacional_Ajustado_30623.pdf

The promotional leaflet is available at:

www.gov.br/inpi/pt-br/central-de-conteudo/publicacoes/marcascoletivasA4mar2023.pdf

Promotional videos are available at:

www.youtube.com/watch?v=JBpaJ7ppMJQ;
www.youtube.com/watch?v=ARlnRNbfeE8; and
www.youtube.com/watch?v=V1kOz1B1_UU

The Philippines

- Team composition and country-level project plan: In December 2020, the country-level project plan for the Philippines was drafted and approved. The Philippines designated a local project focal point within the national IP Office (IPOP HL). A national project consultant was also engaged to provide support.
- Scoping study: The scoping study on the potential groups of producers and their products that could benefit from the use of collective marks was prepared by the national project consultant in English and completed in May 2021.
- Information event: An information event on the potential benefits of the use of collective marks was held, in hybrid format, from April 14 to 16, 2021. Due to the COVID-19

	<p>pandemic, the information event was held over three days for three groups of Pili producers, traders and processors, each from different provinces.</p> <ul style="list-style-type: none">• <u>Product selection and identification/creation of association</u>: The association Orgullo Kan Bicol (OKB) was selected as the beneficiary, for which a collective mark was developed and registered. Its members produce different types of products from the tropical tree “Pili”, such as nuts, pastries, handicrafts from the shell, and cosmetic products from the oil.• <u>Workshops with OKB members</u>: Due to the COVID-19 pandemic, the workshops on the main elements of their collective mark were held virtually through Zoom from August 11 to 12, and on September 7 and 16, 2021. These workshops focused on the regulations of use, the list of goods to be covered, and the design of the logo.• <u>Regulations of use</u>: The regulations of use of the collective mark were drafted in English by the national project consultant and subsequently adopted by the OKB members.• <u>Logo design</u>: A local supplier was commissioned to design the logo of the collective mark. The logo was finalized in December 2021. A transfer of copyright agreement was then prepared and signed by WIPO and OKB in March 2022, to officially transfer the copyright over the logo to the association.• <u>Registration of the collective mark</u>: The certificate of registration was granted on April 25, 2022.• <u>Launch Event</u>: The Event to launch the collective mark was held in Legazpi City, on June 14, 2022. A field visit was also organized to discuss with the OKB producers about the future use of the collective mark.• <u>Training on collective marks</u>: Due to the COVID-19 pandemic, a three-day training for IPOPHL staff was held virtually through Zoom from October 3 to 4 and 11, 2022, which aimed at strengthening further the capacity and knowledgebase of IPOPHL staff, and addressed the benefits of collective marks, origin-identifiers, standards and requirements, stakeholder engagement, as well as governance and management of associations.• <u>On demand workshops with OKB members</u>: Upon request, five workshops were organized in March and April 2023, to strengthen the capacity of OKB members in the management and use of the collective mark. These workshops addressed, amongst others, the opportunities and challenges of collective marks, the regulations of use, standards and requirements, and internal governance.• <u>Awareness-raising material</u>: The awareness-raising material developed under this project in the Philippines include a practical guide, and a short video in the English language. A flyer and a brochure describing the OKB association and their
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newly developed collective mark were also developed.

The practical guide is available on the IPOPHIL website:
www.ipophil.gov.ph/trademark/

The short video is available on the WIPO dedicated project webpage for the [Philippines](#).

Tunisia

- Team composition and country-level project plan: In March 2021, the country-level project plan for Tunisia was drafted and approved. Tunisia designated a local project focal point within the national IP Office (INNORPI). Two national project consultants were also engaged to provide support.
- Scoping study: The scoping study on the potential groups of producers and their products that could benefit from the use of collective marks was prepared by the national project consultants in French and completed in May 2021.
- Information event: An information event on the potential benefits of the use of collective marks was held, in hybrid format, on June 25, 2021. WIPO participated in the event virtually through Zoom, and the two national project consultants attended in person.
- Product selection and identification/creation of association: A group of producers of honey, honey-derived products, essential oils and other local products in the region of Ghardimaou, Jendouba, was selected. Through this project, WIPO assisted the producers in the creation of the *Association de Producteurs pour la Promotion des Produits de Ghardimaou* (APROG) to enable the development and registration of their collective mark.
- Workshops with APROG members: An initial roundtable discussion on the main elements of the collective mark was held on September 6, 2021. This was followed by a workshop held, in hybrid format, on November 18, 2021. The workshop aimed to guide the selected group of producers in the development of their collective mark and in the establishment of the association. WIPO participated in this workshop virtually through Zoom, and a national consultant attended in person. A second workshop, also organized in hybrid format, took place on March 28, 2022. This workshop focused on the regulations governing the use of the collective mark. As with the first workshop, WIPO participated in this workshop virtually through Zoom, and the national consultants attended in person. A third workshop took place in Ghardimaou, Jendouba, from January 23 to 24, 2023, to strengthen the capacity of the APROG members in the effective use of their collective mark post-registration.
- Regulations of use: The regulations of use of the collective mark were drafted in French by the national project consultants and subsequently adopted by the APROG members. In addition to the regulations of use, a complementary set of “product

specifications” (*cahier de charges*) was prepared.

- Logo design: A local supplier was commissioned to design the logo of the collective mark. The logo was finalized in May 2022. A transfer of copyright agreement was then prepared and signed by WIPO and APROG in November 2022, to officially transfer the copyright over the logo to the association.
- Training on collective marks: A two-day training was held in Tunis and Jendouba from June 1 to 2, 2022. The first day of training aimed to strengthen the capacity and knowledgebase of INNORPI staff in the development and registration of collective marks. The second day of training resulted in the finalization and adoption of the regulations of use, and the internal legal framework of the APROG association.
- Registration of the collective mark: The certificate of registration was granted on October 27, 2022.
- Launch Event: The Event to launch the collective mark was held in Ghardimaou, Jendouba, on July 27, 2023. A field visit to a Market Fair took place after the launch, which provided an opportunity for APROG members to showcase and promote their products associated with the collective mark and engage with potential consumers, thereby fostering economic development in the region.
- Awareness-raising material: The awareness-raising material developed under this project in Tunisia include a practical guide, a promotional leaflet and a short video in the Arabic and French languages.

The practical guide is available at:

www.innorpi.tn/sites/default/files/inline-files/Guide%20de%20la%20marque%20collective%20fr.pdf

The promotional leaflet is available at:

www.innorpi.tn/sites/default/files/inline-files/depliant%20fr.pdf

The short video is available on the WIPO dedicated project webpage for [Tunisia](#).

Horizontal activities:

- A WIPO dedicated [webpage](#) on this project is available in the six official UN languages, and additionally, in Portuguese. On the main page, a general awareness-raising video on collective marks is disseminated in English, French, Spanish, Arabic, and Portuguese.
- One-minute videos for WIPO’s awareness-raising and promotional purposes on social media were produced, based on the short videos developed for each beneficiary country.
- A side event will take place on the margins of the CDIP 32nd session, in which all four beneficiary countries will present the project’s takeaways to Member States.

	<ul style="list-style-type: none"> • An exhibition will also be established to showcase the project's outputs in each beneficiary country. • A video testimonial by each beneficiary country was developed and will be shown during the CDIP 32nd session.
<p><u>Key Results and Impact of the Project</u></p>	<p>Key results:</p> <ul style="list-style-type: none"> ✓ The project guided the members of the selected association in each beneficiary country through the entire procedure for developing a collective mark, from designing the logo for the collective mark, to registering the collective mark and to train them on the management and use of the collective mark. ✓ The development of the awareness-raising material in the local language has proven to be fundamental for strengthening the capacity and knowledge of the members of the selected associations as well as for reaching other stakeholders at the grassroots level. ✓ Members of the selected associations of producers show a higher degree of knowledge and familiarity with collective marks, as a result of the activities and consultations held during the project implementation. ✓ The governance and cooperation among the members of the selected associations seem strengthened as a result of the work undertaken for the development of the collective mark.
<p><u>Experience gained and lessons learned</u></p>	<p>Lessons learned:</p> <ul style="list-style-type: none"> • Collaboration with a wide range of national and local institutions has proven key for the success of the project. In particular, institutions providing support to local producers and enterprises have facilitated the communication with the selected associations and will play a crucial role in the post-implementation phase. • In this type of project, the selection of the pilot associations/groups of producers is one of the most relevant steps. The more time and effort are put to carefully analyze the pilot associations, the more successful, smooth and easy the implementation of the project becomes. • Where the associations/groups of producers had been established prior to the start of the project, it has been easier for those groups to work together to develop and register their collective mark. • The members of the selected associations might require further support for the management, use and control of the collective mark after registration. • Flexibility in terms of project management has been essential to respond to the challenges posed by the COVID-19 pandemic and to adapt to the needs and circumstances of each beneficiary country. • Despite the fact that the vast majority of activities of the project

	<p>have been undertaken through virtual/hybrid means, in-person activities remain very important in certain cases, such as for the interaction with associations of producers, often located in rural and isolated areas.</p>
<p><u>Risks and Mitigation</u></p>	<p>The following were risks identified and materialized during the implementation of the project. The mitigation strategies were also those identified and implemented.</p> <p><u>Risk 1:</u> Possibility of recurrence of COVID-19 or similar crisis and, consequently, lockdown and other restrictive measures that hamper the project's implementation.</p> <p><u>Mitigation 1:</u> Following up on the situation in the beneficiary countries and regular discussion with local focal points. Should it be necessary, an extension of the duration of the project would be requested to the CDIP. Adaptation of the modalities of implementation of activities (virtual meetings prioritized, travel minimized) where possible.</p> <p><u>Risk 2:</u> The associations of producers might need further assistance to effectively use the collective mark after the project is completed.</p> <p><u>Mitigation 2:</u> Upon request, the project team will provide support to the selected associations on the use and control of the collective mark, as far as the project timeline and budget permits.</p>
<p><u>Project Implementation Rate</u></p>	<p>The budget implementation rate at the end of February 2024, proportional to the total allocated budget for non-personnel resources was: 85%. The project's budget for personnel resources has not been utilized as the implementation was undertaken by DACD staff.</p> <p>Further details are available in the Annex II to this document.</p>
<p><u>Previous Reports</u></p>	<ol style="list-style-type: none"> 1. The first progress report was contained in Annex II to document CDIP/26/2. 2. The second progress report was contained in Annex II to document CDIP/29/2. 3. The third progress report was contained in Annex I to document CDIP/31/3.
<p><u>Follow-up and dissemination</u></p>	<p>Follow-up:</p> <p>Each beneficiary country is encouraged to utilize the experience, knowledge and awareness-raising material generated through this project to help other local enterprises develop and register their own collective mark. Possible actions that could be taken include organizing training workshops based on the practical guide, and conducting awareness raising activities using the promotional leaflet and short video.</p> <p>Dissemination:</p> <p>The WIPO dedicated web page on this project includes all project</p>

documentation, and awareness-raising material developed in the framework of the project. The web page is available in the six official UN languages and in Portuguese, and will remain accessible on the WIPO website and updated, as appropriate.

All the relevant information about the projects is also available in the Catalogue of DA Projects and Outputs at:

https://dacatalogue.wipo.int/projects/DA_1_4_10_01

PROJECT SELF-EVALUATION

Key to Traffic Light System (TLS)

****	***	**	NP	NA
Fully achieved	Strong progress	Some progress	No progress	Not yet assessed/discontinued

<u>Project Outputs</u> (Expected result)	<u>Indicators of Successful Completion</u> (Output Indicators)	<u>Performance Data</u>	<u>TLS</u>
Three beneficiary countries selected (in addition to the Plurinational State of Bolivia)	Three countries selected (based on agreed selection criteria); and	Fully achieved: In addition to the Plurinational State of Bolivia, the Philippines, Brazil and Tunisia were selected.	****
	Focal points appointed for country project implementation	Local focal points appointed in each of the four beneficiary countries.	
Country-level project plans approved	Four project implementation plans drafted and approved (one per beneficiary country)	Fully achieved: Country-level project plans were drafted and approved in each of the four beneficiary countries.	****
Four scoping studies on potential products/services that could benefit from the use of collective marks (one per beneficiary country)	Final scoping studies validated by the beneficiary countries' local focal points and WIPO Secretariat	Fully achieved: Four scoping studies completed.	****
Information events for local authorities and entrepreneurs on the potential benefits of the use of collective marks	Significant percentage of participants to the events reported a better understanding about the potential benefits of the use of collective marks	Fully achieved: Four information events were held, with an average of 90% of participants in the four beneficiary countries reporting that the events were useful or very useful to get a better understanding about collective marks.	****
Selection of one product in each beneficiary country for which a collective mark will be developed and registered and creation of association or identification of already existing association	One product selected and one association created/identified in each beneficiary country	Fully achieved: Four products were selected and four associations created/identified.	****
Workshops with the members of the	Widespread agreement among members of	Fully achieved: Workshops held in the four beneficiary countries	****

associations	associations about the main elements of the development and registration of the collective mark	resulted in an agreement among members of associations about the main elements of the development and registration of the collective mark.	
Drafting and adoption of regulations of use of the collective mark (in each beneficiary country)	Regulations of use drafted and adopted in each beneficiary country	Fully achieved: Four sets of regulations of use drafted and adopted.	****
Design of the logo for the collective mark (in each beneficiary country)	Design of the logo for the collective mark (in each beneficiary country)	Fully achieved: Four logos designed.	****
Registration of the collective mark (in each beneficiary country)	One collective mark registered in each beneficiary country	Fully achieved: Four collective marks registered.	****
Events to launch the collective mark	Successful organization of launching events (one for each collective mark / beneficiary country)	Fully achieved: Launch events were successfully held in each of the four beneficiary countries.	****
Development of a practical guide on the development and registration of collective marks, for replication in other scenarios	Practical guide developed for each beneficiary country	Fully achieved: Four practical guides developed and validated by the local focal points.	****
Conduct of training activities for IP offices on the development and registration of collective marks (in each beneficiary country)	Significant percentage of participants indicated that the trainings have improved their knowledge and skills in relation to the development and registration of collective marks	Fully achieved: Training activities held in the four beneficiary countries, with an average of 90% of participants in the four beneficiary countries reporting that the trainings were useful or very useful to acquire more knowledge and skills on the development, registration and use of collective marks.	****
Production of awareness-raising material (in each beneficiary country)	Production of a promotional leaflet and a short video (for each beneficiary country)	Fully achieved: Four promotional leaflets and four awareness-raising videos prepared.	****

[Annex II follows]

DA Project on the Registration of the Collective Marks of Local Enterprises as a Cross-cutting Economic Development Issue

Resource Utilization as at March 15, 2024

(in Swiss francs)

Cost Category	Project Budget	Expenditure ¹	Budget Utilization
Personnel Resources	125,000	-	0%
Non-personnel Resources	325,000	277,008	85%
Total	450,000	277,008	62%

¹ Excludes expenditure for project evaluation and the CDIP side event. Personnel Resources have not been utilized as the implementation has been undertaken by DACD staff.

[End of Annex II and of document]