

Committee on WIPO Standards (CWS)

Twelfth Session
Geneva, September 16 to 19, 2024

REPORT ON TASK NO. 55 BY THE NAME STANDARDIZATION TASK FORCE

Document prepared by the Name Standardization Task Force Co-Leaders

SUMMARY

1. The Name Standardization Task Force is responsible for developing a new WIPO standard assisting Intellectual Property Offices (IPOs) in providing better 'quality at source' in relation to customer names. The Task Force has completed a final proposal for a recommendation on the process of data cleaning of customer names and submitted it for consideration at this session of the Committee on WIPO Standards (CWS).

BACKGROUND

2. The Name Standardization Task Force, co-led by the Korean Intellectual Property Office (KIPO) and the International Bureau, was established at the fifth session of the CWS held in 2017 and assigned the 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.”

(see paragraph 85 of document CWS/5/22).

3. At its seventh session in 2019, the CWS noted that the Secretariat has 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.”

4. Also in 2019, a workshop was hosted by the International Bureau to discuss challenges, practices and solutions regarding name standardization. Speakers were invited from both industry and IPOs to share practices and potential solutions. At this workshop, the International Bureau noted that IPOs had many different approaches to achieving clean applicant name data. Further information on the workshop is available in WIPO website at:

https://www.wipo.int/meetings/en/details.jsp?meeting_id=51426.

5. At its eighth session in 2020, the CWS requested the Task Force to prepare a set of recommendations for Offices to advice on improving the quality of applicant name data (see paragraph 102 in document CWS/8/24). At its ninth session in 2021, the CWS noted the Task Force’s plan to continue gathering customer data cleaning practices from the Task Force members in 2022 and to prepare recommendations for the tenth session of the CWS (see paragraph 118 of document CWS/9/25). Finally, at its tenth session in 2022, the Task Force reported its progress made on draft recommendations for data cleaning in support of name standardization, which were provided for early feedback but had not yet reached consensus by the Task Force (see paragraphs 114 to 116 of document CWS/10/22).

6. At its eleventh session held in 2023, the Name Standardization Task Force presented a proposal for a set of guidelines for the data cleaning of names for consideration and adoption by the CWS. The CWS agreed to using the term ‘recommendations’ instead of ‘guidelines’ in the name of proposed new WIPO standard and supported the Secretariat’s proposal to call the new standard “WIPO Standard ST.93”. The CWS did not adopt the proposed standard and sent back the draft to the Name Standardization Task Force for further discussion and improvement. The Secretariat agreed to investigate the possibility of publishing a collection of transliteration tables on WIPO website (See paragraphs 135 to 137 of document CWS/11/28.)

7. At the same session, the CWS approved the revised description of Task No. 55 which reads:

“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.”

PROGRESS ON TASK NO. 55

Objective

8. Task No. 55 explicitly sets out one of its aims as preparing a set of recommendations for 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, for example by supporting accurate statistical analysis.

Relevant Actions for 2024

9. At the eleventh session, the Name Standardization Task Force agreed to focus on finalizing a revised proposal for a new WIPO standard. Firstly, they reviewed outstanding interventions from several delegations stated at the eleventh session of the CWS. The Task Force discussed improvements for the proposal via its wiki and held virtual meetings in April and June 2024.

Potential Challenges or Dependencies

10. The Task Force noted the limited feedback from its members in reviewing and improving the draft document as a significant challenge. The comprehensiveness of the recommendations for cleaning of customer name data could be enhanced through wider participation and more interactive discussions among Task Force members.

Progress Evaluation

11. Despite the challenges indicated above, the Task Force has prepared the revised proposal for a set of recommendations on the process of data cleaning of names and submits it for consideration and adoption by the current session. The proposal is reproduced as the Annex to document CWS/12/16.

12. In addition, the Task Force also discussed the provision of transliteration table used by Offices in the context of customer names. Several Task Force Offices shared their current practices and indicated that some other Task Force Members would provide their transliteration table(s). The Task Force noted that the publication of transliteration tables in WIPO website could help applicants or representatives to provide their names in different languages and Offices to conduct name cleaning processes. It should be noted that the Secretariat propose to publish these transliteration tables in Part 7 of the WIPO Handbook if the proposed standard is approved at the current session (see paragraph 13 of document CWS/12/16).

WORKPLAN

13. Once the proposed new Standard is adopted by the CWS, Task No. 55 can be considered complete. At the same time, the Task Force recognizes that it would be beneficial to exchange IPO practices regarding the cleaning of customer name data and how Offices use the cleaned or normalized names with a view to update the new Standard. In this regard, the Task Force Co-Leaders propose to revise the description of Task No. 55 as follows:

“Share customer name cleaning practices, including any algorithms used, as well as where and how to use the clean data; prepare a set of practical guidelines for IP offices; and ensure the necessary revisions and updates of WIPO Standard ST.93”

14. If the CWS approves the revision to the description of the Task No. 55 proposed above, the Task Force will continue its work under the revised description of Task No. 55.

15. The CWS is invited to:

(a) note the content of this document, in particular the progress made on the final draft recommendations for the data cleaning of names; and

(b) consider and approve the proposed new description of Task No. 55 as referred to in paragraph 13 above.

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