# Standard Essential Patent Development Report

2025

China National Institute of Standardization

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中国标准化研究院
CHINA NATIONAL INSTITUTE OF STANDARDIZATION
NIS

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# Data Statement

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# Preface

During the period spanning from 2024 to 2025, the integration of standards and patents endeavors has transcended the boundaries of new-generation information technology to encompass key technological domains in a wider array of emerging and future-oriented industries. Moreover, legislative, judicial, and enforcement initiatives concerning Standard Essential Patents (SEPs) have witnessed a notable uptick in frequency, both at the domestic and international levels. As an indispensable conduit for the transformation and application of innovation achievements, SEPs have evolved into a strategic innovation resource impacting the stability of industrial and supply chains, along with the overall industrial competitiveness.

As a national-level comprehensive standardization research institution, the China National Institute of Standardization (CNIS) has taken an active approach to implementing the major decisions and arrangements concerning SEPs made by the Central Committee of the Communist Party of China and the State Council. It has meticulously collected and organized approximately 600,000 patent declaration data entries involving standards from international, foreign, and domestic sources, along with corresponding standard and patent data. Additionally, it has gathered policy and regulatory data on SEPs from over 200 representative international organizations in the fields of intellectual property and standardization, as well as from major countries (regions) around the globe. Furthermore, it has compiled data on judicial and enforcement cases from nearly 10 jurisdictions. Based on

this comprehensive data collection, the CNIS has self-developed a set better and more comprehensively integrate relevant data andof innovative tool and service -"Insight SEP" (Biao Pu Dong Cha) - which integrates a "data foundation + intelligent modules +solutions" framework so as to better and more comprehensively integrate relevant data and conduct a systematic analysis to assess the latest development trends in this field. Building upon the *Development Report on Standard Essential Patents (2024)* (hereinafter referred to as the "2024 Report"), CNIS has compiled the Development Report on Standard Essential Patents (2025) (hereinafter referred to as the "2025 Report").

The 2025 Report builds upon and further refines the purpose and functional orientation established by the 2024 Report. It is designed to offer a thorough, systematic, and impartial overview of the international, foreign and domestic development landscape of SEPs to the relevant government departments, social organizations, universities and colleges, research institutions, enterprises, and professionals engaged in the SEP domain. The report endeavors to assist innovation entities in gaining a more profound understanding of the theoretical approaches for the coordinated and innovative development of standards and patents. It aims to drive the seamless integration of technological innovation, standard development, patent portfolio management, and industrial application across the entire value chain. By doing so, it seeks to bolster the stability of industrial and supply chains and enhance the overall industrial competitiveness. Ultimately, the report aspires to contribute to the high-quality realization of the goals set forth in the "14th Five-Year Plan" and to ensure a successful commencement of the "15th Five-Year Plan" period.

The report is divided into five parts, with the principal content and

viewpoints outlined as follows:

**Part I provides reference approaches to advancing standard-patent collaboration.** This part presents a set of reference approaches tailored to aid innovation entities in understanding the mechanism of standard-patent collaboration by key element analysis, engaging in the end-to-end practice of standard-patent collaboration, and systematically mastering the rules of standard-patent collaboration, so as to empower innovation entities in enhancing their overall capabilities in carrying out initiatives for standard-patent collaboration.

**Part II examines the practices concerning SEPs within major international organizations.** This part offers a systematic overview of the overall landscape of the World Trade Organization (WTO) dispute settlement mechanism with respect to SEPs in the context of the disputes between the European Union (EU) and China. Furthermore, it presents the most recent advancements in the World Intellectual Property Organization (WIPO)'s endeavors concerning SEPs. Additionally, it provides updated data and analysis on patents involved in standards within the three major international standards organizations: the International Organization for Standardization (ISO), the International Electrotechnical Commission (IEC), and the International Telecommunication Union (ITU). This analysis is carried out from multiple perspectives, including the overall development trends, country-specific developments, and the specific fields covered by these patents.

**Part III summarizes the developments of SEPs in major countries (regions).** This part examines the strategic deployments, international cooperation, as well as the latest practices in legislation, law enforcement, and judicial aspects concerning SEPs in major countries (regions) such as the

United States, the European Union, the United Kingdom, Japan, South Korea, Brazil, and India from 2024 to 2025. By doing so, it presents the governance dynamics and development trajectories of SEPs outside China.

**Part IV elaborates on the developmental achievements and main challenges of SEPs in China.** This part undertakes a quantitative analysis of the detailed data and development trajectories of patents incorporated in China's national standards and social organization standards as of the end of 2024. It expounds on the most recent advancements of China's SEP policies and systems. Furthermore, it systematically summarizes and integrates typical Chinese practices pertaining to SEPs from three dimensions: dispute resolution mechanisms, industrial development, and local exploration.

**Part V proposes recommendations for SEP development and governance in the "15th Five-Year Plan" period.** Analyzing the most recent development trends in the SEP field, this part presents three targeted recommendations for the initial stage of the "15th Five-Year Plan" period: "Uphold a comprehensive approach and enhance the synergy of collaborative governance among departments"; "Maintain a commitment to building internal capabilities and harness the potential of market innovation entities"; and "Stay dedicated to in-depth research and continuously elevate systemic and comprehensive capabilities".

The CNIS will persist in closely tracking the most recent advancements in SEPs. It will actively engage in collaborative efforts to continuously deepen relevant research, and update and release a series of annual reports, contributing to the holistic development of SEPs.

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