



# **STANDARD ESSENTIAL PATENT** DEVELOPMENT REPORT

2026

China National Institute of Standardization

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The primary data used in this report, such as declarations and standards, mainly come from standards development organizations (SDOs), including the three major international standards development organizations (ISO, IEC, and ITU), regional SDOs, and international professional SDOs. These data are statistically compiled, analyzed, and assessed through the “Insight SEP” intelligent tool independently developed by the China National Institute of Standardization (CNIS). The collection cut-off date for declarations and other primary data is December 31, 2025, and standards-related data only covers standards in force on that same date. The primary data about standards and patents was subjected to a comprehensive cleansing and processing procedure to get rid of duplicate or invalid data. Additionally, the statistical methodologies employed were further refined. In the event of any discrepancies between the data presented in this report and those in the two previous reports, the data contained within this report shall take precedence. Data sourced from official databases of SDOs vary in update frequency, update methods and statistical methodologies. This report performs structured processing of multi-source data to the fullest extent to deliver high-quality data analysis. Even so, statistical discrepancies may still exist. Nonetheless, inherent limitations in the standard essential patents (SEPs) disclosure processes, including but not limited to blanket disclosures, incomplete disclosures, and excessive disclosures, have the potential to induce disparities between the statistical outcomes and the real-world data.

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## Preface



During the period spanning from 2025 to 2026, a new wave of technological revolution and industrial transformation advanced at an accelerated pace. Frontier technologies emerged in a continuous stream, driving and underpinning the rapid rise of future industries. As an important outcome of the coordinated development of scientific and technological innovation and standardization, standard essential patents (SEPs) have evolved into a key innovation resource of strategic value, exerting an ever-growing impact on the stability of industrial and supply chains and on overall industrial competitiveness. From a global development perspective, the SEP ecosystem has continued to grow in breadth and depth; the governance practices of major international organizations have continued to deepen; and traditional developed countries (regions) and emerging economies have made increasingly frequent strategic deployments in this field, alongside their growing legislative, judicial, and law-enforcement practices. Together, these trends are profoundly shaping innovation and the competitive landscape in key industries.

As a national-level comprehensive standardization research institution, the China National Institute of Standardization (CNIS) thoroughly implements the major decisions and arrangements concerning SEPs made by the Central Committee of the Communist Party of China and the State Council. CNIS advances SEP-related scientific research in depth, and continuously consolidates its foundations in theoretical systems, technical capabilities, data tools, platform resources, and branded products. It has innovatively proposed

a full-chain structural analysis model for SEPs, continuously optimized the “Insight SEP” intelligent tool, and steadily enriched technical methods such as essentiality assessment and royalty calculation. In addition, CNIS routinely conducts data integration and trend analysis in the field of SEPs to better support the compilation of the *Standard Essential Patent Development Report (2026)* on the basis of the *Standard Essential Patent Development Report (2025)* and the *Standard Essential Patent Development Report (2024)*.

The *Standard Essential Patent Development Report (2026)* builds upon and further refines the purpose and functional orientation established by the two previous reports. It is intended for relevant government departments, social organizations, universities and colleges, research institutions, enterprises, law firm, and professionals engaged in the SEP domain. It will systematically present the SEP ecosystem and objectively present the overall development trends of SEPs at the international, foreign, and domestic levels, thereby contributing to strengthening awareness among more innovation entities regarding the coordinated layout of technology, patents, and standards, to developing and expanding emerging industries and to making forward-looking arrangements for future industries.

This report comprises six parts, with their main content and viewpoints outlined as follows:

**Part I provides an overview of the standard essential patent ecosystem.** This part focuses on the three stages of SEP portfolio planning, licensing negotiations, and dispute resolution, and summarizes the relevant entities involved. These entities include innovation entities such as enterprises and research institutes; international organizations in the field of intellectual





property; patent authorities of various countries (regions); standardization bodies; patent pools; licensing negotiation groups; judicial authorities; administrative enforcement authorities; and alternative dispute resolution (ADR) institutions, among others.

**Part II examines the governance practices concerning SEPs within major international organizations.** This part systematically reviews the overall resolution of World Trade Organization (WTO) disputes between the EU and China concerning SEPs. It updates the information about the latest developments in the World Intellectual Property Organization (WIPO)'s work on SEP-related information tools, thematic reports, and alternative dispute resolution. 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 latest practices of the United States, the European Union, Germany, the United Kingdom, Japan, South Korea, India, Brazil, Morocco, and other countries and regions in the field of SEPs from the perspectives of strategic deployment, policy planning, legislative developments,

regulatory enforcement, dispute resolution, international cooperation, and research findings. By doing so, it presents the governance dynamics and development trajectories of SEPs outside China.

**Part IV reviews the SEP practices in key industries.** This part describes the trend of expanding coverage of SEP practice across industries, summarizes the status of relevant entities such as patent pools and ADR institutions, and reviews the latest practices in licensing negotiations and dispute resolution. By doing so, it presents a development trend of continuous expansion in the field of SEP practice, increasing diversity of entities involved, and growing frequency of practical activities.

**Part V elaborates on the development achievements of SEPs in China.** It outlines the latest developments in China's SEP policies and systems. Furthermore, it reviews, synthesizes, and summarizes typical judicial practices pertaining to SEPs in China.

**Part VI presents an outlook on SEP development during the “15th Five-Year Plan” period.** It proposes recommendations from three aspects: coordination in policies and systems, coordination in working mechanisms, and coordination in scientific research and innovation.

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



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