ISO Strategic Partnership Unit – Partner Assessment (Technical)

Date

ISO PSDO cooperation initial assessment

This document aims to assess eligibility, synergy and most optimal cooperation mechanism between the partner and ISO, for technical cooperation.

Question or enquiries, if any, should be sent to [partnership@iso.org](mailto:partnership@iso.org).

1. Partner Information

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| Basic Information |
| 1. Partner Organization Name |
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| 1. Contact Person (name, title, and contact details) |
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| 1. Address |
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| 1. Website |
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| 1. Date of Establishment |
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| 1. Legal Status (e.g., NGO, government body, private entity) |
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| 1. Existing technical cooperation with ISO (if any, such as liaison status, agreements, etc.): |
| Pre-fill by ISO/CS and ask is there anything missing |

## Proposed Area of Cooperation (PSDO)

There are different opportunities for partner engagement in ISO technical work, ranging from guest expert to partnering standards development (PSDO). Different engagement level has different commitment required, benefit and impact ,as well as governance approval process. Figuring out the right way to cooperation on technical content is key, before we can establish a mutual beneficial partnership. Please refer to different engagement opportunities in ISO technical work in Annex 1. Should you decide that PSDO is the most ideal way to cooperate, please proceed to the follow section.

* 1. **Please provide information on the proposed area of cooperation, including the involved ISO Technical Committee(s), technical content (including your standards, ISO standards, or any work in the pipeline):**

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* 1. **Please provide information on proposed synergies and mutual benefits, including how your deliverables are global relevant and internationally applicable, and the potential impact brought forward by the cooperation.**

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* 1. **Please select the most ideal PSDO mechanism for the proposed cooperation.**

Joint development of ISO/*XYZ* Standards

The partner (*XYZ*) and ISO have proposed to jointly develop the standards in the committee(s). If approval of the proposal for joint development from both sides, the relevant Partner’s working group (or equivalent) and ISO Committee Working Group will establish a joint group of experts to conduct the development of joint standards.

FDIS fast-track processing of an approved *XYZ* standard

An approved standard from the partner (*XYZ*) within the scope of the ISO and such standard having global use and acceptance, may be proposed for adoption as an ISO International Standards, and will proceed to Final Draft International Standard (FDIS) fast-track processing. The partner shall ensure that proposals for adoption can be published by ISO (if approved) in accordance with the Guidelines to the IEC, ISO, ITU Common Patent Policy prior to submitting them to ISO. Such requests shall be submitted to the Secretary-General of ISO for acceptance. The Secretary-General shall then submit a proposal to the relevant ISO committee for an 8-week ballot.

## Copyright and Commercial Considerations (PSDO)

ISO Standards are not freely available, and has its own copyright policy, designed to maintain the quality, integrity, and sustainability of the international standardization process. By entering the PSDO agreement, you need to consider the copyright and commercial arrangement.

Standards that are jointly developed should be jointly owned between ISO and the partner organization, including any future versions of such standards. The copyright of the joint standards that are developed via fast-track adoption can be owned by the partner organization.

In both cases, ISO (together with its members) and the partner organization may sell the joint standards according to their own rules and policies, without royalties to each other. Joint standards shall not be available for free, except for standards development purposes, national enquiry or any similar consultation process.

ISO and its members, and the partner organization, each have full exploitation and enforcement rights. This includes the rights to create derivative products such as collections, packages, handbooks or any similar products, and the right to translate such standards and published national adoptions.

**Please provide your comment should you see any concerns for the proposed commercial arrangements.**

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**Please provide any further information you see needed for the cooperation.**

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## Annex 1 - Ways to Engage in ISO Technical Work

#### Guest expert

Contribute expertise on an ad-hoc basis to specific meetings and/or ISO TC, SC, or WG documents. No formal agreement between ISO and the partnering organization is needed. Guest experts typically join one or two meetings before formally joining the group through one of the channels mentioned below.

*Note: Inputs provided to the TC, SC, WG are on behalf of the partnering organization.*

* **Commitment level**: Low: Participation is on an as needed basis.
* **Key benefits**: Influence specific standards/deliverables or discussions with expert insights, but with very flexible involvement.
* **Impact**: Provides a channel to offer inputs on specific standards/deliverables or specific discussions, suitable for targeted influence without ongoing commitment. However, impact is limited as there is no formal mechanism or concrete obligation for the ISO TC, SC, or WG to consider input.
* **Process to join:** Invitation from ISO/CS staff or an ISO NSB who is a P-member in the committee – no additional approvals needed.

#### NSB nominated expert

Active participation in the ISO TC, SC, or WG via nomination by participating NSB(s).

*Note:* *Inputs provided to TC and SC are on behalf of the NSB. Inputs provided to WG are on behalf of individual’s expertise.*

* **Commitment level**: Medium: Regular contribution to technical discussions and document reviews.
* **Key benefits:** Direct involvement in standard development processes; access to all TC, SC, or WG related materials with opportunity to actively contribute and influence the NSB’s vote
* **Impact**: Provides a channel to offer inputs on specific standards/deliverables or discussions, with potential to influence/nominate experts through multiple NSBs to strengthen positioning, including voting. Requires sustained commitment and resources and coordination with the NSB. Partner’s voice may be diluted by inputs from other national stakeholders representing NSB.
* **Process to join:** Appointed by any ISO NSB who is a P-member in the committee – no additional approvals needed.

#### Liaison

More than 800 organizations in liaison with ISO Technical Committees. Serve as an expert on behalf of the partnering organization in the ISO TC, SC, or WG with varying rights depending on liaison category. See the [liaison guidance](https://www.iso.org/publication/PUB100270.html) and [list of liaison organizations](https://www.iso.org/organizations-in-cooperation-with-iso.html) on ISO website for more details. No formal agreement between ISO and the partner is needed, however the TC/SC must approve to accept the partnering organization as a liaison.

Organizations in liaison may exceptionally benefit from additional rights. For example, ISO/TC 283 committee leadership have invited ILO representatives to join the advisory group responsible for setting the strategy for the revision of ISO 45001.

* **Commitment level**: Medium: Regular contribution to technical discussions and document reviews.
* **Key benefits**: Sustained influence over standard development; access to latest drafts and discussions; positioning/commenting on behalf of ILO.
* **Impact**: Allows for targeted influence within specific committees and workgroups. Provides a platform for continuous and substantive contribution to the standards development process through meeting participation and commenting, though influence may be tempered by the lack of voting rights.
* **Process to join:** The organization sends a [liaison application form](https://isotc.iso.org/livelink/livelink/Open/19409988) to ISO/CS and the ISO committee, which is followed by an approval ballot at the committee-level.

#### PSDO agreement

An agreement between ISO and (typically) another standards development organization specifying the terms under which the organizations will jointly develop standards/deliverables, including elements like use of logos, dual designation, copyright, and/or specific commercial considerations. PSDOs are particularly effective when the organizations' portfolios complement each other in a given area of standardization. PSDOs are typically used when a partner proposes their own work/copyright to ISO to “fast-track” into the international system, resulting in the publication of a joint standard/deliverable (e.g. *ISO/XYZ 1234*).

* **Commitment level**: High: Significant resource investment in joint standard development and approval processes.
* **Key Benefits**: International recognition and dissemination of jointly developed standards; enhanced global impact.
* **Impact**: Enables direct inclusion of the partner organization’s copyright within the ISO framework through a “fast track” procedure, which accelerates the standards development process. Avoids duplication in the marketplace and allows for resource sharing. Gives stipulations for consensus between the two organizations and allows for mutual recognition of the cooperation through dual logo and dual designation of the final deliverable(s)
* **Process to join**: When a final draft is agreed between the two organizations, ISO/CS must seek final approval by the ISO Technical Management Board (TMB) for the standards development process, followed by approval by the ISO Council for the overall agreement.

#### Ad-hoc cooperation agreement

An agreement between two organizations (at the organizational level) which formalizes the conditions for collaboration outside of the traditional terms found in the other options noted above. Ad-hoc cooperation agreements allows for more flexibility to modify terms according to each organization’s needs with well-defined mechanisms to facilitate collaboration, including process to work jointly, consensus/approval mechanisms, use of copyright, use of logos, dual designation, etc.

* **Commitment level**: Variable: Depends on the project scope and duration.
* **Key benefits**: Flexibility to customize agreement to meet needs of both organizations; focused impact on specific issues.
* **Impact**: Allows for greater flexibility outside of ISO’s traditional processes and/or business model, ensuring mutual benefit, recognition, and decision making between the organizations. Provides a structured framework for collaboration, maximizing resource use and enhancing the effectiveness of the resulting standards. Sets clear conditions for the mechanisms of joint development and approvals throughout the standards development lifecycle.
* **Process to join**: When a final draft is agreed between the two organizations, ISO/CS must seek final approval by the ISO Technical Management Board (TMB) for the standards development process, followed by approval by the ISO Council for the overall agreement.