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PSDO Agreement between CalConnect and ISO

THE CALENDARING AND SCHEDULING CONSORTIUM

TC PUBLISH

CALCONNECT STANDARD

DRAFT

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FOREWORD

The Calendaring and Scheduling Consortium ("CalConnect") is global non-profit organization with the aim to facilitate interoperability of technologies across user-centric systems and applications. CalConnect works closely with liaison partners including international organizations such as ISO, OASIS and M3AAWG.

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

This document was prepared by the Joint Coordination Group of ISO and CalConnect.

This is the first edition of this document.

INTRODUCTION

Purpose

The purpose of this document is to establish an understanding between ISO and The Calendaring and Scheduling Consortium (known as "CalConnect").

This document formalizes the process of collaboration of ISO and CalConnect to co-operate and to enable the collaborative development of standards.

The resulting standards are to be jointly published by ISO in accordance to the ISO process, and by CalConnect as CalConnect standards.

Background

The Calendaring and Scheduling Consortium ("CalConnect") is global non-profit organization with the aim to facilitate interoperability of technologies across user-centric systems and applications.

CalConnect creates publicly available CalConnect Standards through a consensus-based standardization process described in [CalConnect Directives: Standardization and publication](#), and documents created in accordance with [CalConnect Standing Document: Document requirements](#).

ISO produces ISO International Standards for Geographical information/Geomatics in accordance with processes described in [ISO/IEC Directives, Part 1, Consolidated ISO Supplement](#) and [ISO/IEC Directives, Part 1](#), with the standard documents drafted in accordance with the editorial rules of [ISO/IEC Directives, Part 2](#).

Intent

CalConnect is a Category A Liaison organization with ISO, and is allowed to submit standardization documents through the ISO "Fast-Track" and PAS submission procedures (in accordance with [ISO/IEC Directives, Part 1](#) and [ISO/IEC Directives, Part 1, Consolidated ISO Supplement](#)).

However, both ISO and CalConnect believe that a collaborative development process provides additional benefits:

- maximizes the deliverable expertise of their experts; and
- maximizes the quality of the resulting International Standard.

This agreement facilitates a collaborative development process for proposed work from CalConnect in conjunction with ISO.

1. SCOPE

This document addresses publication processes for these collaborative cases between ISO and CalConnect ("Parties"):

- co-development of a standardization work item, proposed by either party
- CalConnect submission of a document to ISO for the International Standardization process

Standardization processes in this document is intended to align with [ISO/IEC Directives, Part 1](#) and [ISO/IEC Directives, Part 1, Consolidated ISO Supplement](#),

2. NORMATIVE REFERENCES

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

CalConnect Directives: Standardization and publication, *CD 10001, CalConnect Directives: Standardization and publication*

CalConnect Standing Document: Document requirements, *CD 10002, CalConnect Directives: Standard document requirements*

ISO/IEC Directives, Part 1, Consolidated ISO Supplement, ISO/IEC Directives, Part 1, Consolidated ISO Supplement, *Procedures specific to ISO*

ISO/IEC Directives, Part 1, ISO/IEC Directives, Part 1, *Procedures for the technical work*

ISO/IEC Directives, Part 2, ISO/IEC Directives, Part 2, *Principles and rules for the structure and drafting of ISO and IEC documents*

3. TERMS AND DEFINITIONS

For the purposes of this document, the terms and definitions given in ISO/IEC Directives, Part 1, ISO/IEC Directives, Part 1, Consolidated ISO Supplement and ISO/IEC Directives, Part 2 and the following apply.

3.1. Terms and definitions

3.1.1

standardization project

an organized process with one or more standardization work items that contributes towards a defined scope of work

3.1.2

standardization work item

publishable work item that creates output that relates to standardization within a *standardization project* (Clause 3.1.1)

3.1.3

project owner

entity with authority in charge of a *standardization project* (Clause 3.1.1)

3.1.4

document

written output of a work item

3.1.5

CalConnect deliverable

document (Clause 3.1.4) that could be a CalConnect Standard, Guide, Specification, Report

3.1.6

ISO TC deliverable

document (Clause 3.1.4) of an ISO TC as described in ISO/IEC Directives, Part 1

Note 1 to entry: According to [ISO/IEC Directives, Part 1](#), ISO TC deliverables include the following types: International Standards, Technical Specifications, Publicly Available Specifications and Technical Reports.

3.1.7

CalConnect technical committee

CalConnect TC

internal committee of CalConnect tasked with a scope of work it is responsible for

3.1.8

document stage

stage of document as specified in the ISO harmonized stages (as defined in [ISO/IEC Directives, Part 1, Consolidated ISO Supplement](#))

3.1.9

standardization project output

output of a *standardization project* ([Clause 3.1.1](#))

Note 1 to entry: In this document, it explicitly means any documents and IP rights produced by the standardization project.

3.1.10

proposal for standardization

proposal for a new work item for standardization

3.1.11

co-develop

act of developing a work item by multiple parties from the proposal stage

3.1.12

co-publish

act of publishing *documents* (Clause 3.1.4) of identical content by multiple parties

3.1.13

joint work item

work item *co-developed* (Clause 3.1.11) by both parties

3.1.14

joint publication

publication that is *co-published* (Clause 3.1.12) by ISO and CalConnect

Note 1 to entry: Both parties jointly hold copyright of the joint publication.

3.1.15

Joint Coordination Group

JCG

advisory group with representatives from ISO and CalConnect on the execution and maintenance of this agreement

3.1.16

co-development document register

document register of a list of *co-developed* (Clause 3.1.11) *documents* (Clause 3.1.4) developed under this agreement, held by the *Joint Coordination Group* (Clause 3.1.15)

3.2 Abbreviations

IPR Intellectual Property Rights

4. JOINT COORDINATION GROUP

4.1. General

ISO and CalConnect establishes a Joint Coordination Group ("JCG") for:

- maintenance and execution of this agreement; and
- coordination and maintenance of procedures between two organizations.

4.2. Mediator for coordination issues

This group meets as necessary and serves as the forum for discussing and resolving issues that may arise from time to time.

4.3. Coordination role

The JCG will support the individual liaisons between ISO working groups and project teams, with CalConnect technical committees.

The presence of the JCG is not intended to affect responsibilities of existing organizational structures in ISO and CalConnect.

4.4. Members

The JCG is composed of four members:

- Two representatives from ISO
- Two representatives from CalConnect

5. INTELLECTUAL PROPERTY RIGHTS

5.1. Free of restrictions

Both parties agree that text of all working documents developed under this agreement, as well as the final ISO deliverables will remain free of IPR restrictions that would limit their application.

5.2. Copyright

Copyright of standardization deliverables created under this document will be jointly owned by both parties.

5.3. CalConnect-sourced documents

CalConnect grants ISO a world-wide, non-exclusive, non-sub-licensable license (except for national body adoption), to use contents of CalConnect submitted documents to ISO, for the development and publishing of the deliverables under this agreement.

ISO agrees that the resulting ISO deliverable will contain a suitable statement similar to the one in the base documents indicating that the standard was derived from the relevant CalConnect sourced documents.

5.4. Patented content

Patented content in a standard will be governed by the ISO directives and the CalConnect IPR policy. Any patents involved knowingly in the document must be made transparent prior to the DIS stage.

5.5. Re-publishing

This agreement binds the parties that the re-publishing of content developed under this agreement will adhere to this agreement.

ISO and CalConnect individually retain the rights to publish all documents developed under this agreement according to their own practices.

Publishing arrangements between ISO and ISO member countries are unchanged by this agreement.

6. COLLABORATIVE DEVELOPMENT PROCESS

6.1. General

A collaborative development process is crucial to effective development of work items between ISO and CalConnect. Both organizations agree to align appropriate internal processes and procedures in order to facilitate joint development of work items.

Experts in ISO are encouraged to participate in the technical work on CalConnect technologies by participating in CalConnect technical committees.

6.2. Alignment of project stages

The following table provides a mapping between ISO project stages and CalConnect project stages. This document identifies stages according to the ISO project stage names.

Table 1 – Alignment between ISO and CalConnect project stages

Identification in this document	ISO harmonized stage (ISO/IEC Directives, Part 1)	CalConnect stage
Preliminary	00 Preliminary	00 Preliminary
Proposal	10 Proposal	10 Proposal
Preparatory	20 Preparatory	20 Preparatory
Committee	30 Committee	30 Committee
Enquiry	40 Enquiry	40 Enquiry
Approval	50 Approval	50 Approval
Publication	60 Publication	60 Publication
Review	90 Review	90 Review

Identification in this document	ISO harmonized stage (ISO/IEC Directives, Part 1)	CalConnect stage
Withdrawal	95 Withdrawal	95 Withdrawal

6.3. Track synchronization

ISO deliverables can be developed according to different tracks and timelines detailed in [ISO/IEC Directives, Part 1](#) and [ISO/IEC Directives, Part 1, Consolidated ISO Supplement](#).

For a project under this agreement, CalConnect agrees to adopt a developmental track not slower than the track selected in ISO to ensure the synchronicity between development outcome and publication.

6.4. First draft

A first draft of the standardization deliverable may be created for proposal submission, or may be created in the Committee stage. The draft shall be created through a collaboration process between experts from both organizations, or at least, the proposing organization should have received input from the other organization.

CalConnect agrees that any draft submitted to ISO shall adhere to the requirements detailed in [ISO/IEC Directives, Part 2](#) and applicable ISO internal guidelines.

6.5. Preliminary stage

At the first instance where either party wishes to co-develop a project with the other party, it should be raised to the JCG. The JCG shall consult the stakeholders to determine appropriateness of the project and advise the proposer.

If the project is rejected by the JCG, its output may still be developed within CalConnect if it is appropriate, and its output may still be proposed to the JCG for co-development in later stages.

6.6. Proposal stage

When the JCG determines interest within ISO to co-develop the proposed project, CalConnect should submit an NWIP to ISO for ballot indicating its wish to co-develop the proposed project.

If accepted, the project shall be adopted on both sides by a CalConnect TC and an appropriate workgroup in ISO. Members of the project group shall be represented by

experts in both parties in accordance with the rules of the liaison relationship. This project shall then be listed in the JCG register of co-developed projects.

If rejected, its output may still be developed within CalConnect if it is appropriate, and its output may still be proposed to the JCG for co-development in later stages.

6.7. Preparatory, Committee, Enquiry stages

The goal of these stages are to create an approved, balloted draft of the deliverable by ISO.

In these stage the members of the project groups within both organizations shall collaborate closely to ensure efficient and effective development of the deliverable of the respective stages. The deliverable shall be developed jointly by experts of both organizations.

The approval process at ISO shall be adhered to. CalConnect agrees to synchronize its project stage with the corresponding ISO stage.

Specifically:

- If a deliverable is approved by ballot at ISO, CalConnect will advance the project stage at its project group accordingly.
- If a deliverable is rejected by ballot at ISO, CalConnect will not advance project stage at its project group, unless a ISO re-ballot approves advancement of the deliverable.
- In cases where a development stage is optional and skipped in accordance with [ISO/IEC Directives, Part 1](#) and [ISO/IEC Directives, Part 1, Consolidated ISO Supplement](#), CalConnect shall set the stage of its project at the corresponding stage.

6.8. Public review

A public review period of 60 days is required for the compliance to [WTO TBT Agreements](#) rules, for which both ISO and CalConnect adhere to.

A 60-day public review shall be held in the DIS stage of the ISO deliverable.

Comments to ISO shall be performed according to [ISO/IEC Directives, Part 1](#) and [ISO/IEC Directives, Part 1, Consolidated ISO Supplement](#); comments to CalConnect shall be performed through CalConnect's public review procedure.

The parties agree to synchronize the dates of review periods for the maximum benefit to the joint work item.

6.9. Abandonment

A joint work item may be abandoned by one of the two parties if it sees it being inappropriate or is no longer interested or able to contribute to the joint work item. Each party is allowed to abandon the joint work, which at that point will become sole work of the other party.

A notice of such must be sent by the abandoning party to the JCG and distributed by both parties to its members.

The abandoning party, if the abandoned work is carried on by the other party, is required to explicitly agree that the copyright of such work is to be waived to the other party to allow publication of the document.

If the abandons party wishes to rejoin an abandoned work item, it is agreed in this agreement that it is allowed, given a notice is filed at the JCG, unless in exceptional circumstances.

6.10. Additional collaborators

Parties may bring in additional collaborators under this agreement, given it is approved by the JCG, that the provisions of this agreement are fully satisfied by agreements present between all collaborators.

6.11. Notification

Notification of availability of new documents within CalConnect will be announced to the appropriate ISO working groups and CalConnect technical committees.

6.12. Availability of working documents

Drafts and working documents are available according to each party's normal practices.

6.13. Distribution of publication

After an ISO ballot on the acceptance of a joint work item as DIS, FDIS or IS, the joint work item will be published as a CalConnect Standard.

6.14. Promotional activities

Promotional programs will be shared between ISO and CalConnect for the purpose of coordinating marketing activities via the JCG.

7. MAINTENANCE OF DELIVERABLES

7.1. General

Maintenance of published joint work will be a joint process.

7.2. Review period

The review period of a joint published item is 5 years, following the ISO Directives. The review shall be performed by the joint project group, as determined by the JCG.

7.3. Updates

When a document is deemed to be updated, both parties agree that each other has the first right of refusal.

7.4. Withdrawal

When a review determines that a joint published item should be withdrawn, both parties agree that the item to be indicated as withdrawn.

7.5. Updates

When a document is deemed to be updated, both parties agree that each other has the first right of refusal.

8. CORRECTIONS AND AMENDMENTS

8.1. Comment distribution

When a party receives formal comments on the joint work item, it shall share it with the other party within 2 weeks of receiving them, documented and distributed through the JCG.

8.2. Joint action

The project groups in both organizations responsible for the published deliverable shall work in collaboration to address any corrections or necessary amendments.

9. AMENDMENTS TO THIS AGREEMENT

ISO and CalConnect agree that changes to this agreement shall be first proposed through the JAG, and formalized by a resolution from one party to the other.

10. MAINTENANCE AGENCY AND REGISTRATION AUTHORITY

10.1. General

Both organizations recognize that a maintenance agency or registration authority is required for the successful implementation of certain standardization deliverables resulting from this agreement.

10.2. Default volunteer role

For standards developed under this agreement, CalConnect volunteers to serve as their maintenance agency or registration authority as necessary.

CalConnect shall submit a suitable application to ISO once a NWIP requiring establishment of a maintenance agency or registration authority for a joint work item is approved.

11. DELIVERABLE REQUIREMENTS

11.1. General

ISO and CalConnect wish to establish rules to ensure the collaborative effort by both parties are mutually recognized within deliverables.

11.2. Trademark and copyright statements

Similar to the process applied on national adoption of an ISO deliverable, trademarks and copyright statements of both organizations will appear on the document cover page as well as in the foreword.

11.3. Publication dates

The edition year and the year of publishing of a joint deliverable shall be identical in the ISO and CalConnect deliverables.

11.4. Cover page

In ISO and CalConnect deliverables, as well as any further adoptions, shall retain the logographic marks of both organizations.

11.5. Introduction part

The introduction shall state that it is a joint work product between ISO and CalConnect.

11.6. Document identifier and references

ISO deliverables published under this agreement will be referenced in as ISO/CC in ISO documents, and CalConnect deliverables will be referenced as as CC/ISO within CalConnect documents.

References will contain sufficient information for those wishing to obtain the equivalent documents of the other party to be able to do so.

11.7. Project code

A mutually acceptable number will be used for the project code, with the goal of achieving identical deliverable numbers in ISO and CalConnect to prevent potential ambiguity.

BIBLIOGRAPHY

- [1] WTO TBT Agreements, World Trade Organization, *The WTO Agreements Series*
Technical Barriers to Trade