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Information Technology**

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## Background

One of the fundamental relationships in standards development is that between standards organizations and between standards organizations and organizations that are acknowledged leaders in specific knowledge areas that can contribute to international standards development. The liaisons formed leverage mutual participation and collaboration ensuring that available expertise and talent can be brought to bear to advance the development and promulgation of timely, high quality and relevant international standards. For JTC1 external liaison arrangements ensure increased use of its IT standards as well as increased credit and repute to itself. For external liaison organizations to JTC1 these relationships also brings a number of direct and intangible benefits.

As the impact and scope of IT has grown JTC1 and SCs have had to increase their efforts in considering solicitations for liaisons from external organizations, while at the same time are actively pursuing partnerships. This guide seeks to provide additional guidance to JTC1, SCs and WGs in the consideration of liaison opportunities with external organizations.

### Liaison Categories:

JTC1 Directives, Version 5.3 (JTC-1-8557), paragraph 3.3.4.2 identifies three active categories of technical liaison with external organizations outside of the ISO, IEC, ITU, and the participating NBs these being:

*Category A: Organizations that make an effective contribution to the work of the technical committee or subcommittee for questions dealt with by this technical committee or subcommittee.*

*Category B: Organizations that have indicated a wish to be kept informed of the work of the technical committee or subcommittee.*

*Category C: Organisations which make an effective technical contribution and participate actively at the WG or project level of JTC 1 or its SCs.*

### Considerations for Category A Liaison

A Category A liaison is the highest level of external liaison operating in the development of IS with JTC1 and its SCs and for the purpose of generating and sponsoring IS standards operates (save for voting) operates with most of the privileges afforded to P-member NBs. In essence a Category A liaison organization operates as a trusted partner with JTC1 and/or a SC. As such great care and consideration should be taken in entering into a Category A liaison, not

only for the JTC1 and SCs wanting to engage in this relationship but for the Category A liaison candidate organization who must invest significant time, resources and effort in supporting this commitment.

The following provides a non-exhaustive list of considerations for entering into or maintaining a Category A liaison relationship at the SC level:

- a. A Category A liaison organization should be internationally recognized as a leader in the development of domestic or international standards in a recognized area of IT or ICT relevant to the activities of the SC.
- b. A Category A liaison should only be entered into at the JTC or SC level, supported in kind by a secretariat at these levels (i.e. a Category A liaison relationship is not appropriate at the WG level);
- c. A Category A liaison between an external organization and an SC should be entered into for an extended period, generally not less than five years in duration;
- d. A Category A liaison organization should share similar principles, practices and processes to that of the JTC1 and/or the appropriate SC(s); these including, but not limited to:
  - i. open and non-discriminatory membership;
  - ii. consensus-based development of technical standards, reports, or policies through the use of working groups, committees etc; and
  - iii. making reasonably accessible their technical standards, reports or policies to the public.
- e. The mandate and scope of a Category A liaison organization's activities should be clearly rationalized and generally map well to the work plan of the SC entering into the liaison relationship; therefore, the SC should appropriately have access to all Category A liaison documents regarding the membership, charter, work plan, long term business objectives and any other pertinent documents required in this regard;
- f. The terms of reference, program of work activities and deliverables of the Category A liaison organization should match a minimum of fifty percent (50%) of the program of work activities and deliverables of the SC as identified in the Business Plan of the SC in which it seeks a relationship.
- g. The terms of reference, program of work activities and deliverables of the Category A liaison organization should overlap with those of two or

more WGs or OWGs of the SC in question, unless there is only one WG in operation within the SC.

- h. An appropriate liaison point of contact should be made available to the SC and WG leadership and secretariat for the full duration of the Category A liaison being in effect
- i. A Category A liaison organization should demonstrate a level of activity, commitment, transparency and sustained capacity to comply with all the pertinent procedures and modes of operations of the SC in carrying out its commitment. Organizations in Category A liaison with SC's that are not fulfilling these responsibilities may be terminated or changed to a category C liaison as a result of annual reviews.

Additional consideration for Category A liaison at the JTC1 level

In addition to the considerations noted above, the following additional considerations are in order for those organizations being considered for a Category A liaison at the JTC1 level:

- a. A Category A liaison organization should be recognized internationally as a leader in contributing to the broad-based development of IT or ICT standards as adopted by industry, government and non-government organizations, having demonstrated this for a period of not less than five (5) years;
- b. The charter, terms of reference, program of work, planned activities and deliverables of a Category A liaison organization should meet the criteria for a Category A liaison organization at the SC level for at least two SCs;
- c. The Category A liaison organization must be able to provide ongoing and permanent points of contact to support meeting attendance and other obligations as required from the JTC1 or its SCs, and with the ISO and IEC;
- d. The Category A liaison organization should have a standards development process similar to that of the JTC1 and should demonstrate the full capacity to meet the imperatives of the Fast Track process for development and publications of international standards, technical reports, and other documents per the JTC Directives.
- e. The Category A liaison organization should provide a business plan to JTC1 and advise on its planned fast-track activities, and deliverables to be introduced to the JTC1 over the next three (3) year period.

### Considerations for Category B Liaison

The following list provides a non-exhaustive list of considerations for entering into or maintaining a Category B liaison relationship:

- a. There is an interest by the Category B organization to be kept abreast of JTC1 activities in advance of the public.
- b. There is an interest by JTC1 that this organization be advised of JTC1 activities in advance of regular public dissemination. Examples of this interest may include:
  - i. The organization represents the interest or otherwise lobbies the interest of the ISO/IEC and/or JTC1;
  - ii. Alignment of activities undertaken by the Category B organization in research and development activities that are complementary to the JTC1 or an SCs interests
  - iii. The organization is considering a higher level liaison status but has little experience in international standards development at this time; or
  - iv. The organization is considering a higher level liaison status but has insufficient capacity at this time.
- c. JTC1 and its SCs should regularly maintain contact with Category B liaison organizations in order to understand the needs and use of the information provided to the Category B liaison and that the use of the information is not contrary to the interests of JTC1.

### Considerations for Category C Liaison

The following list provides a non-exhaustive list of considerations for entering into or maintaining a Category C liaison relationship:

- a. A Category C liaison is similar to a Category A liaison but is designed for a much narrower scope of work and period of time as appropriate for a SC or WG, typically in the generation or maintenance of one or more international standards, families of standards or technical reports all within a specific technical area;
- b. A Category C liaison organization typically is a reputable organization in the technical area in which it participates within the WGs and generally has a proven record in published standards, reports, or development of policy and advice;
- c. A Category C liaison organization's interest at the SC level is typically specialized – normally limited to a subset of less than fifty percent (50%) of the program of work, activities, or deliverables of a SC; and
- d. Active liaison projects are necessary and fall within the scope of the stated liaison.