

**Body of Rules**

**Supplemental Rules of Cooperation  
Between IO-Link Members and the PNO**

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67 **Revision log:**

Version		Date	Changes/History
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V1.01		1/21/2010	Final version with editorial changes
d1.02		4/19/2012	Adjustments to new working group structure and rules of use for IO-Link logo and patent list updated
d1.1		7/4/2012	Changes for Steering Committee
V1.1		7/31/2012	Final version after approval by Steering Committee
d1.2		7/25/2013	Proposal of changes by Lorenz, Striegel, Wenzel, Witte
d1.5		June 2015	License model incorporated in agreement with team. Lorenz, Wenzel, Witte, Uffelmann, Willems
V2.0		6/10/2015	Approved version
V2.1		9/15/2015	Editorial changes from Advisory Board Review after clearance with Steering Committee

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70	<b>Contents</b>	
71		
72	1 Motivation and objective .....	5
73	1.1 Technology.....	5
74	1.2 Fieldbus independence .....	5
75	2 Organization within PNO.....	6
76	2.1 Committee C IO-Link .....	6
77	2.2 Work processes.....	6
78	2.3 Steering Committee (SC) .....	6
79	Role of the SC Spokesperson .....	7
80	3 Conformity and Competence/Test Center .....	8
81	4 Membership and licensing .....	9
82	4.1 IO-Link membership .....	9
83	4.2 Licensing for non-members.....	9
84	5 Finances/membership fees .....	10
85	5.1 Appropriation.....	10
86	5.2 Release of resources.....	10
87	5.3 Cash audits .....	10
88	6 Documents .....	11
89	6.1 IEC Standards .....	11
90	7 Marketing .....	12
91	7.1 Web server.....	12
92	7.2 Trade fair appearance .....	12
93	7.3 Contact with other fieldbus organizations or companies.....	12
94	7.4 Publications.....	12
95	8 Word mark/logo (IO-Link logo) .....	13
96	9 Patents and property rights for IO-Link members.....	14
97	A.1 TC/WG Guideline.....	15
98	A.2 IPR rules of the PNO including specifications for handling of intellectual	
99	property rights (patents and copyrights) .....	15
100	A.3 Document Management .....	15
101	A.4 IO-Link Structure .....	15
102	A.5 IO-Link Quality Policy .....	15
103	A.6 IO-Link license model .....	15
104	A.7 Approved Component List.....	15
105		
106		

## 107 **1 Motivation and objective**

108 This document governs the cooperation between IO-Link members or licensees and the PNO  
109 and describes the rights and obligations of the partners.

### 110 **1.1 Technology**

111 The IO-Link technology (or SDCI) is described in detail in the corresponding specification  
112 ([www.io-link.com](http://www.io-link.com)) or in IEC 61131-9.

### 113 **1.2 Fieldbus independence**

114 A primary goal of IO-Link technology is its fieldbus independence.

115 This means that in principle the IO-Link technology can be used on all fieldbus systems (in com-  
116 pliance with the corresponding rules of the fieldbus).

117 In general the goal is to grant all interested companies and organizations access to the IO-Link  
118 technology. The rules and possibilities relevant for this are presented in this document.

119

## 120 **2 Organization within PNO**

121 The technology is managed within the PNO in Committee C "IO-Link". The IO-Link structure with  
122 all WGs (working groups) and PGs (project groups) can be found in document [A4].

123 The existing "TC/WG Guidelines" [A1], the supplemental "IPR-Rules" of the PNO containing  
124 specifications for handling intellectual property rights (patents and copyrights) [A2], and the  
125 "Document Management" [A3] of the PNO and its bylaws also apply without exception. Supple-  
126 mental rules are presented in this paper and its appendices.

### 127 **2.1 Committee C IO-Link**

128 The central task of the IO-Link members is to decide on the technical development of the IO-Link  
129 technology. Included under this is the independent establishment of connections with other or-  
130 ganizations in coordination with the PNO Board of Directors.

131 All members of PROFIBUS&PROFINET International (PI) can also serve as members of and par-  
132 ticipate in the PGs/WGs of IO-Link; they must however acknowledge these rules in writing.

133 The PNO Support Center informs the CC Leader about interested parties and new IO-Link mem-  
134 bers.

### 135 **2.2 Work processes**

136 The IO-Link members meet once per year (General Meeting). Every 3 years, the General Meet-  
137 ing will elect a **Steering Committee**, consisting of 5-21 company representatives (including  
138 Spokesperson). Each member (company) can nominate a candidate for this. The PG/WG Lead-  
139 ers of IO-Link, who are nominated by the Steering Committee and confirmed by the PNO Adviso-  
140 ry Board, become automatic members of the Steering Committee. At the IO-Link General Meet-  
141 ing, the members of the Steering Committee will be elected from a nominated list of applicants  
142 (electoral list). The number of elected members is always at least one person more than the  
143 number of WG Leaders serving in the Steering Committee. If a new WG is established, a person  
144 on the electoral list will automatically move up to the SC.

145 Rights and obligations of IO-Link members:

- 146 • Election of the Steering Committee
- 147 • Annual information about the activities of the SC
- 148 • Annual budget information
- 149 • Contribution to technological development by participation in working groups
- 150 • Worldwide promotion of the IO-Link technology (marketing)

151 Each IO-Link member can run for election to the Steering Committee.

152 When the IO-Link group is dissolved, all rights for the IO-Link technology, results of the IO-Link  
153 work, and financial resources from contributions will be transferred to the legal successor orga-  
154 nization.

### 155 **2.3 Steering Committee (SC)**

156 The Steering Committee manages the implementation of technology- and marketing-related  
157 measures in the individual PGs/WGs. Within the working groups, the respective PG/WG leader  
158 can establish teams as needed and on a time-limited basis and name a Team Leader.

159 Rights and obligations of the SC:

- 160 • Election of the SC Spokesperson
- 161 • Nomination of a Leader for the CC (SC Spokesperson and CC Leader should be the  
162 same person); the CC Leader is automatically a member of the SC
- 163 • Nomination of the PG/WG Leaders
- 164 • Steering of the technology development (additions to standards, profile creation, testing)
- 165 • Steering of the IEC-related activities

- 166       • Steering and approval of the actions decided in the Marketing WG  
167       • Planning and release of financial resources  
168 The Steering Committee (SC) meets 4 to 6 times per year, as needed.  
169 Meeting minutes are prepared for each meeting and are stored on the IO-Link Project Server  
170 (www.io-link-projects.com). Each IO-Link member has access rights to this server.  
171 The SC reports on its main activities and use of financial resources at the annual General Meet-  
172 ing.  
173 Any member can submit proposals and questions to the SC. The topics raised will be handled at  
174 one of the next meetings.  
175 The following rules apply to the Steering Committee (SC):  
176       • All members in the Steering Committee (companies) have only one vote.  
177       • Proxies:  
178       ✓ Elected SC members of member organizations (companies) can appoint a proxy in their  
179       company to exercise the voting right  
180       ✓ PG/WG Leaders can have their voting right exercised by a representative of their own  
181       company as well as by a particular representative of another company.  
182       • SC members are informed about pending decisions in a timely manner, i.e., at least 2 weeks  
183       in advance (e-mailed invitation including agenda). The SC shall then have a quorum.  
184       • All decisions are deemed accepted with a simple majority. Exception: organizational changes  
185       require approval by a 2/3 majority.  
186 **Role of the SC Spokesperson**  
187       • Convenes the SC and the annual General Meeting.  
188       • Serves as moderator of the SC meetings and the General Meeting.  
189       • Performs external IO-Link communications (e.g., press, international standards committees,  
190       other fieldbus organizations).  
191       • Reviews conflicts regarding technology and marketing strategy reported to him and brings  
192       about a decision.  
193 **Role of the CC Leader**  
194       • Coordinates all activities of the Support Center with regard to IO-Link  
195       • Represents the IO-Link interests in the PNO, and vice versa  
196       • Reports to the PNO Advisory Board  
197       • Represents the SC Spokesperson  
198

**199 3 Conformity and Competence/Test Center****200 Conformity/Test:**

201 Every IO-Link Master and IO-Link Device that is placed on the market must have a manufactur-  
202 er's declaration regarding IO-Link conformity. The appropriate tests must be conducted in ac-  
203 cordance with the valid test specification in each case. These tests must be passed and docu-  
204 mented with the manufacturer's declaration. The contents and format of the manufacturer's dec-  
205 laration are defined by the SC and described in the test specification, the use of which is manda-  
206 tory. Details are described in the IO-Link Quality Policy [A5]. A certification requirement may be  
207 decided on by the SC at a later time.

208 For an IO-Link Master with fieldbus interface, the relevant certification or conformity guidelines of  
209 the respective fieldbus organizations apply.

**210 Competence Centers and Test Centers**

211 The IO-Link Steering Committee may accredit Competence Centers and Test Centers for IO-Link  
212 technology.



## 213 **4 Membership and licensing**

### 214 **4.1 IO-Link membership**

215 With IO-Link membership, the member company acquires the right to place any IO-Link products  
216 on the market in observance of the presented rules.

217  
218 The rights to use word marks and figurative marks (logos) (see 8) and the rights to use relevant  
219 patents and property rights (see 9) are granted in accordance with the rules established in this  
220 document.

221 Membership also provides unlimited access to results of the working groups (WG, PG) via the  
222 IO-Link Project Server and the opportunity to actively participate in desired working groups (WG,  
223 PG).

224 Membership fees are described in "Finances/membership fees".

225 Products/product groups can be included in the "Approved Component List" (by the PNO Support  
226 Center) free of charge upon submittal of the manufacturer's declaration.

227

### 228 **4.2 Licensing for non-members**

229 Non-members may also place IO-Link products on the market and make use of word marks and  
230 figurative marks (logos). A license must be acquired in each case for this.

231 The license model excludes active participation in WGs/PGs and access to work results of the  
232 WGs/PGs.

#### 233 Obligations of the licensee:

234 • The licensee is obligated to have the tests required for the manufacturer's declaration  
235 performed at an accredited Test Center and to pay for these tests.

236 • The costs associated with the manufacturer's declaration are settled directly between the  
237 Test Center and the licensee.

238 • Changes to the product properties (functional enhancements) require a "renewal" of the  
239 manufacturer's declaration at an accredited Test Center as the basis for a license update  
240 [A6].

241 • The licensee must acquire the rights to use IO-Link-relevant patents (see IEC 61131-9)  
242 on its own part.

#### 243 Rights of the licensee:

244 • Use of a company-specific VendorID (applied for from PNO Support Center)

245 • Access to current specifications via IO-Link.com

246 • Use of the word marks/figurative marks (logos) for the licensed product for 3 years.

247 • After every 3 years (provided that no change has been made to the product properties),  
248 the license can be extended for another 3 years.

249 • Products will be entered in the "**Approved Component List**" [A7]. This is done by the  
250 PNO Support Center upon submittal of the manufacturer's declaration and a license fee.

251 License fees (Initial entry in "Approved Component List") [A6]

252

253

## 254 **5 Finances/membership fees**

255 The prerequisite for obtaining membership is

- 256 • written acknowledgement of these rules (e-mail).

257 The following scheme is used to calculate the financial contributions to be used for IO-Link ac-  
258 tivities:

- 259 • PNO members, if they join exclusively for the purpose of working on IO-Link: 100% of the  
260 annual contribution of these members
- 261 • PNO members that also want to work on IO-Link: 20% of annual contribution
- 262 • IO-Link members that do not join the PNO (exceptions with strategic importance for IO-  
263 Link with separate cooperation agreement):  
264 80% of the annual contribution of these members (20% is used to cover the expenses  
265 within the PNO, such as for preparing a cooperative agreement)
- 266 • For companies with up to 100 employees that are interested only in IO-Link, the fee can  
267 be reduced to 50% of the standard fee.
- 268 • Subtracted (prior to transfer of financial contributions to the CC) are the annual services  
269 provided by the PNO Support Center for IO-Link. The expenses of the previous year are  
270 used as the basis for calculating these services.

271 The PNO determines both the membership fees as well as the costs for IO-Link and documents  
272 this information in the form of a profit/loss statement on an annual basis (at the end of the calen-  
273 dar year). Every IO-Link member is entitled to view the data via the CC Leader IO-Link.

274 The budget for the fiscal year (calendar year) of the IO-Link members is based on the data pre-  
275 sented by the PNO. The resources for IO-Link are managed by the PNO Support Center.

276 If the budget is used up by IO-Link projects or at the decision of IO-Link members, additional  
277 projects can be decided on according to "TC/WG Guidelines" [A1]. §6 of the "TC/WG-Guidelines"  
278 described in detail the transaction of projects financed by IO-Link members<sup>1</sup>.

279 The fees indicated above are reviewed annually with the Support Center and the SC Spokesper-  
280 son/CC Leader.

### 281 **5.1 Appropriation**

282 The budget must be used for IO-Link technology projects and IO-Link marketing projects.

### 283 **5.2 Release of resources**

284 The Steering Committee provides information on the current budget (planning and realization of  
285 expenditures for marketing, technology, etc.) annually at the General Meeting. The Steering  
286 Committee decides on how the budget will be used.

### 287 **5.3 Cash audits**

288 At every plenary meeting of the SC, the PNO Support Center will inform the SC Spokesperson  
289 about the current status of resources along with a forecast. The SC Spokesperson will inform the  
290 SC during the meeting.

291 The cash audit is performed as part of the overall annual audit of the PNO. The report is issued  
292 as part of the PNO General Meeting.

293 The results will be announced in the meeting minutes and during the IO-Link General Meeting.

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<sup>1</sup> Adherence to an orderly project sequence ensures adherence to functionality, schedule, quality, and budget re-  
quirements.

**295 6 Documents**

296 Rules for creating documents are specified in §3 of the "TC/WG Guidelines". As a deviation to  
297 these guidelines, the IO-Link specification is not labeled as "PNO confidential", in order to make  
298 it accessible to other bus organizations. The same applies to the bus-specific integration specifi-  
299 cations outside PROFIBUS DP and PROFINET IO.

300 Rules for the layout, the required formal parameters, the creation and review processes, and the  
301 distribution of a document are specified in the "Document Management" of the PNO [A3] and the  
302 supplemental rules of the IO-Link Community.

**303 6.1 IEC Standards**

304 The IO-Link technology is standardized in IEC 61131-9. Revisions will be recorded in the IO-Link  
305 specification documents and included in the next version of the IEC standard. In the case of dis-  
306 crepancies, the IO-Link specification documents prevail.

307

## 308 **7 Marketing**

### 309 **7.1 Web server**

310 The CC is authorized to set up a neutral server that contains the technical information and mar-  
311 keting activities. However, PNO-specific information is only available by means of corresponding  
312 links on the IO-Link Projects web server.

313 Regarding the distribution of documents, a different requirement applies, in that the IO-Link  
314 specifications on web servers of other fieldbus organizations can be linked to the neutral IO-Link  
315 web page in order to prevent version conflicts.

### 316 **7.2 Trade fair appearance**

317 The PNO extends an offer to the CC, under the usual conditions, of exhibit space in the PNO  
318 booths at various trade fairs and will be considerate of neutrality requests, to the extent possible.  
319 The procedures at international trade fairs will be governed by the Regional PROFI-  
320 BUS&PROFINET Associations (RPA). The PNO Support Center will provide support for these.

321 Notwithstanding this offer, the IO-Link members are free to arrange their own trade fair activities.

### 322 **7.3 Contact with other fieldbus organizations or companies**

323 Contacts with fieldbus organizations and companies that belong to or drive other fieldbus organi-  
324 zations require the approval of the PNO Board of Directors. For its part, the PNO is obligated to  
325 enable cooperation agreements with the above-indicated companies or organizations for purpos-  
326 es of cooperation with IO-Link. This should ensure the worldwide dissemination of IO-Link.

327 IO-Link members must be informed about these types of activities. If necessary, the SC can de-  
328 cide on special rules regarding membership fees without the consent of the General Meeting.

### 329 **7.4 Publications**

330 It is recommended that the press office of the PNO Support Center be included (copy).

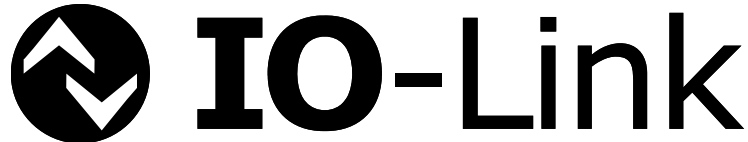
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## 332 **8 Word mark/figurative mark (IO-Link logo)**

333 Development and marketing of IO-Link products using IO-Link word marks/figurative marks (log-  
334 os) is only permitted if the company:

- 335 • Has become an IO-Link member and has acknowledged these rules in writing
- 336 • Possesses a manufacturer's declaration based on the test specification.  
337 For test cases for which test tools previously approved in the WG Technology exist, these  
338 must be used.
- 339 • Has, as a non-member, acquired a license (see 4)

340 The IO-Link technology is being disseminated under a dedicated word mark/logo.



341  
342 The rights to the word mark/figurative mark (logo) as represented, including its colors, have been  
343 transferred to the PNO and must be used without any alteration.  
344 It is available for download on the IO-Link Project Server ([www.io-link-projects.com](http://www.io-link-projects.com)) in the pro-  
345 tected area.

346 Use rights for word mark and figurative mark (logo):

- 347 • Free to everyone in conjunction with fair and favorable presentations and publications
  - 348 • In conjunction with products;
    - 349 ✓ Only for those products that have been tested according to the respective valid  
350 test specification and have passed the tests and confirmed this with the manufac-  
351 turer's declaration (Section 2.3)
    - 352 ✓ For all members that have a valid manufacturer's declaration
    - 353 ✓ For licensees that possess a valid license and have a valid manufacturer's decla-  
354 ration.
- 355

## 356 **9 Patents and property rights for IO-Link members**

357 The rules for handling patents and property rights in conjunction with the IO-Link technology are  
358 specified in the currently valid "IPR Rules" document of the PNO [A2]. These rules must be ob-  
359 served.

360 The following is specified in deviation to these rules:

- 361 • The use of relevant property rights of the IO-Link technology is granted free of charge in  
362 the context of other systems e.g. fieldbuses. Prerequisite is membership in the PNO or in  
363 one of the associated regional organizations (RPA).
- 364 • The use rights are granted only for the purpose of implementing the IO-Link technology  
365 defined in the IO-Link specification, and not for independent modification or further de-  
366 velopment.
- 367 • Sublicensing to a third party (non-affiliated company) is permitted exclusively for the pur-  
368 pose of development, manufacturing and sales of IO-Link products. No rights going be-  
369 yond this will be granted.
- 370 • Every IO-Link member is obligated to grant use rights for IO-Link-relevant property rights  
371 to the IO-Link members free of charge.
- 372 • Acknowledgement of these obligations is the prerequisite for IO-Link membership.

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**376 A.1 TC/WG Guideline**

377 [A1] Guidelines for the Committees and Project Groups/Working Groups of PROFIBUS  
378 Nutzerorganisation e.V. (PNO) (TC/WG Guidelines), Version 4/13/2015 (or later versions)

**379 A.2 IPR rules of the PNO including specifications for handling of intellectual  
380 property rights (patents and copyrights)**

381 [A2] Intellectual Property Rights (IPR) Policy of PROFIBUS Nutzerorganisation e.V. (PNO),  
382 Version 4/4/2011 (or later versions)

**383 A.3 Document Management**

384 [A3] Document Management Guideline of PROFIBUS Nutzerorganisation e.V., Version 1.42,  
385 March 2013 (or later versions)

**386 A.4 IO-Link Structure**

387 [A4] IOL\_Organisation\_V1.1.ppt (or later versions)

**388 A.5 IO-Link Quality Policy**

389 [A5] IO-Link Quality Policy (document in progress);  
390 Manufacturer\_declaration\_120216.doc, or later version

**391 A.6 IO-Link license model**

392 [A6] IO-Link license model (document in progress);

**393 A.7 Approved Component List**

394 [A7] IO-Link Approved Component List (document in progress)

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