IO-Link

Body of Rules

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

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1 Motivation and objective

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

1.1 Technology

The IO-Link technology (or SDCI) is described in detail in the corresponding specification (www.io-link.com) or in IEC 61131-9.

1.2 Fieldbus independence

A primary goal of IO-Link technology is its fieldbus independence. This means that in principle the IO-Link technology can be used on all fieldbus systems (in compliance with the corresponding rules of the fieldbus).

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

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

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

2.1 Committee C IO-Link

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

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

The PNO Support Center informs the CC Leader about interested parties and new IO-Link members.

2.2 Work processes

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

Rights and obligations of IO-Link members:

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

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

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

2.3 Steering Committee (SC)

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

Rights and obligations of the SC:

- Election of the SC Spokesperson
- Nomination of a Leader for the CC (SC Spokesperson and CC Leader should be the same person); the CC Leader is automatically a member of the SC
- Nomination of the PG/WG Leaders
- Steering of the technology development (additions to standards, profile creation, testing)
- Steering of the IEC-related activities
The Steering Committee (SC) meets 4 to 6 times per year, as needed.

Meeting minutes are prepared for each meeting and are stored on the IO-Link Project Server (www.io-link-projects.com). Each IO-Link member has access rights to this server.

The SC reports on its main activities and use of financial resources at the annual General Meeting.

Any member can submit proposals and questions to the SC. The topics raised will be handled at one of the next meetings.

The following rules apply to the Steering Committee (SC):

- All members in the Steering Committee (companies) have only one vote.
- Proxies:
  - Elected SC members of member organizations (companies) can appoint a proxy in their company to exercise the voting right.
  - PG/WG Leaders can have their voting right exercised by a representative of their own company as well as by a particular representative of another company.
- SC members are informed about pending decisions in a timely manner, i.e., at least 2 weeks in advance (e-mailed invitation including agenda). The SC shall then have a quorum.
- All decisions are deemed accepted with a simple majority. Exception: organizational changes require approval by a 2/3 majority.

**Role of the SC Spokesperson**

- Convenes the SC and the annual General Meeting.
- Serves as moderator of the SC meetings and the General Meeting.
- Performs external IO-Link communications (e.g., press, international standards committees, other fieldbus organizations).
- Reviews conflicts regarding technology and marketing strategy reported to him and brings about a decision.

**Role of the CC Leader**

- Coordinates all activities of the Support Center with regard to IO-Link.
- Represents the IO-Link interests in the PNO, and vice versa.
- Reports to the PNO Advisory Board.
- Represents the SC Spokesperson.
3 Conformity and Competence/Test Center

Conformity/Test:

Every IO-Link Master and IO-Link Device that is placed on the market must have a manufacturer's declaration regarding IO-Link conformity. The appropriate tests must be conducted in accordance with the valid test specification in each case. These tests must be passed and documented with the manufacturer's declaration. The contents and format of the manufacturer's declaration are defined by the SC and described in the test specification, the use of which is mandatory. Details are described in the IO-Link Quality Policy [A5]. A certification requirement may be decided on by the SC at a later time.

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

Competence Centers and Test Centers

The IO-Link Steering Committee may accredit Competence Centers and Test Centers for IO-Link technology.
4 Membership and licensing

4.1 IO-Link membership

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

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

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

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

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

4.2 Licensing for non-members

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

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

Obligations of the licensee:

- The licensee is obligated to have the tests required for the manufacturer's declaration performed at an accredited Test Center and to pay for these tests.
- The costs associated with the manufacturer's declaration are settled directly between the Test Center and the licensee.
- Changes to the product properties (functional enhancements) require a "renewal" of the manufacturer's declaration at an accredited Test Center as the basis for a license update [A6].
- The licensee must acquire the rights to use IO-Link-relevant patents (see IEC 61131-9) on its own part.

Rights of the licensee:

- Use of a company-specific VendorID (applied for from PNO Support Center)
- Access to current specifications via IO-Link.com
- Use of the word marks/figurative marks (logos) for the licensed product for 3 years.
- After every 3 years (provided that no change has been made to the product properties), the license can be extended for another 3 years.
- Products will be entered in the "Approved Component List" [A7]. This is done by the PNO Support Center upon submittal of the manufacturer's declaration and a license fee.

License fees (Initial entry in "Approved Component List") [A6]
5 Finances/membership fees

The prerequisite for obtaining membership is

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

The following scheme is used to calculate the financial contributions to be used for IO-Link activities:

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

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

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

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

The fees indicated above are reviewed annually with the Support Center and the SC Spokesperson/CC Leader.

5.1 Appropriation

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

5.2 Release of resources

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

5.3 Cash audits

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

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

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

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1 Adherence to an orderly project sequence ensures adherence to functionality, schedule, quality, and budget requirements.
6 Documents

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

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

6.1 IEC Standards

The IO-Link technology is standardized in IEC 61131-9. Revisions will be recorded in the IO-Link specification documents and included in the next version of the IEC standard. In the case of discrepancies, the IO-Link specification documents prevail.
7 Marketing

7.1 Web server

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

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

7.2 Trade fair appearance

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

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

7.3 Contact with other fieldbus organizations or companies

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

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

7.4 Publications

It is recommended that the press office of the PNO Support Center be included (copy).
8 Word mark/figurative mark (IO-Link logo)

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

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

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

The rights to the word mark/figurative mark (logo) as represented, including its colors, have been transferred to the PNO and must be used without any alteration.

It is available for download on the IO-Link Project Server (www.io-link-projects.com) in the protected area.

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

- Free to everyone in conjunction with fair and favorable presentations and publications
- In conjunction with products;
  - Only for those products that have been tested according to the respective valid test specification and have passed the tests and confirmed this with the manufacturer’s declaration (Section 2.3)
  - For all members that have a valid manufacturer’s declaration
  - For licensees that possess a valid license and have a valid manufacturer’s declaration.
9 Patents and property rights for IO-Link members

The rules for handling patents and property rights in conjunction with the IO-Link technology are specified in the currently valid “IPR Rules” document of the PNO [A2]. These rules must be observed.

The following is specified in deviation to these rules:

- The use of relevant property rights of the IO-Link technology is granted free of charge in the context of other systems e.g. fieldbuses. Prerequisite is membership in the PNO or in one of the associated regional organizations (RPA).

- The use rights are granted only for the purpose of implementing the IO-Link technology defined in the IO-Link specification, and not for independent modification or further development.

- Sublicensing to a third party (non-affiliated company) is permitted exclusively for the purpose of development, manufacturing and sales of IO-Link products. No rights going beyond this will be granted.

- Every IO-Link member is obligated to grant use rights for IO-Link-relevant property rights to the IO-Link members free of charge.

- Acknowledgement of these obligations is the prerequisite for IO-Link membership.
A.1 TC/WG Guideline

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

A.3 Document Management

A.4 IO-Link Structure
[A4] IOL_Organisation_V1.1.ppt (or later versions)

A.5 IO-Link Quality Policy
[A5] IO-Link Quality Policy (document in progress); Manufacturer_declaration_120216.doc, or later version

A.6 IO-Link license model
[A6] IO-Link license model (document in progress);

A.7 Approved Component List
[A7] IO-Link Approved Component List (document in progress)
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