

# IOGP

## Supplementary procedure for development and maintenance of ISO standards as an ISO liaison member

**Version 2 – Approved 2020-03-09**

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## **0 Preface**

This document contains the supplementary procedure for IOGP as an ISO category A-liaison member to ISO/TC 67 to carry out technical work for the development of draft standards to be submitted to ISO/TC 67 Secretariat (chair and committee manager) for the purpose of development and maintenance of ISO standards. This procedure will also be adapted to other standards committees where ISO/TC 67 has established a formal liaison.

This supplementary procedure is in compliance with and builds on ISO fast-track procedure in accordance with the following requirements of ISO/IEC Directives Part 1, Annex F:

- Document already exists in IOGP (originating from IOGP, ISO or from another organisation).
- As category A-liaison organisation, IOGP can transmit the document to ISO/TC 67 for approval under the fast-track procedure.
- There is no NWIP ballot within ISO/TC 67, i.e. the transmitted document is submitted directly for DIS ballot, followed by FDIS ballot if necessary.
- Document will be registered as PWI in ISO Project Portal during development process in IOGP.
- All ISO/TC 67 members and non-members can vote on the DIS and FDIS before publication.

The principles underpinning this supplementary procedure have been agreed by the ISO Technical Management Board (TMB) at their February 2017 meeting (per Resolution 20/2017).

## **1 Committee structure**

The technical work on standards takes place under the administration of the IOGP Standards Committee Administration Task Force (ATF).

The organisation of the ATF uses a Project Team/Work Group (PT/WG) set-up similar to ISO/TC 67. A Project Team is defined as the group of participants (subject-matter experts) working on a particular draft standard under direction of a Project Lead (PL). A Work Group may work multiple draft standards under direction of a WG Convenor, who may delegate work to a PL.

The IOGP Standards Committee may seek support from other IOGP standing committees, such as Offshore Structures, Safety, Wells Expert and Legal, as necessary.

IOGP will invite relevant non-IOGP member participants to IOGP ATF and the PT/WGs. ATF and the PTs/WGs shall not include participants representing organisations from embargoed countries. It shall be the responsibility of the Project Lead or WG Convenor to enforce this requirement.

The ATF oversees the implementation of this procedure. Work is prioritised according to the individual work item project plan. ATF will escalate matters to the Standards Committee that are outside the remit of the PT/WG, such as ownership issues of draft documents with input from API committees.

## **2 Roles and responsibilities**

### **2.1 Chairperson of the IOGP Project Team/Work Group**

The Chairperson is assigned as Project Lead or WG Convenor. The Chairperson also acts as the interface between the PT/WG and IOGP ATF.

The Chairperson:

- chairs PT/WG meetings on behalf of IOGP
- ensures that persons representing organisations from embargoed countries are not in attendance
- proposes meeting agenda
- records meeting attendance to be issued with the minutes
- does not start any work before list of participants is agreed with IOGP Secretariat
- endorses minutes before issue
- maintains list of participants and informs the IOGP Secretariat about any change
- is responsible for administration of dedicated folder in ShareFile<sup>1</sup>
- is responsible for deliverables.

## 2.2 Participant of a Project Team/Work Group

The participant (subject-matter expert) of a PT/WG:

- is responsible for specific activities volunteered for or agreed with the PL/WG convenor
- does not participate in meetings with persons representing organisations from embargoed countries.

## 2.3 Role of IOGP Secretariat

The IOGP Secretariat will:

- invite IOGP members and non-IOGP member participants to ATF and PT/WGs, maintain list of participants and notify each Chairperson when his/her list of participants is accepted
- provide document management services by ShareFile in support of the collaborative work in PT/WGs
- provide necessary templates for participants, new projects, minutes, deliverables, etc.
- administer the IOGP Standards Solution on a daily basis, including the standing advices to PTs/WGs based on continued learning and experience and periodically updating IOGP website with Standards Solution projects
- monitor PTs/WGs' adherence to the IOGP procedure
- offer editing services
- inform ISO/TC 67 Secretariat, CEN/TC 12 Secretariat, CEN/TC 234 Secretariat and where relevant the Secretariat of other Technical Committees about any new project initiation under IOGP
- transfer the DIS, DTS or DTR drafts to ISO/TC 67 Secretariat
- transfer the input and comments on WD review and the observations on CD and DIS comments resolutions or FDIS drafts to ISO/TC 67 through a publicly available website<sup>2</sup>.

The dedicated IOGP Standards Solution Manager will normally handle this work in close cooperation with the IOGP ATF chair and IOGP staff.

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<sup>1</sup> ShareFile is a password-secured web-based documentation storage and sharing system.

<sup>2</sup> Files will be uploaded to the public information folder on ISO/TC 67's webpage, accessible via <http://isotc.iso.org/livelink/livelink?func=ll&objId=8885347&objAction=browse&viewType=1>.

## 2.4 IOGP Standards Solution Manager

The IOGP Standards Solution Manager ([StandardsSolutionPM@iogp.org](mailto:StandardsSolutionPM@iogp.org)) is part of IOGP Secretariat and responsible for the management of this IOGP Standards Solution.

### 3 Simplified flowchart

Annex 1 shows the simplified flowchart. This IOGP supplementary procedure describes the processes related to IOGP. The processes related to ISO follow the procedures as provided by the ISO/TC 67 Secretariat.

### 4 IOGP deliverables

IOGP can deliver the following draft documents for ISO ballot:

- full text draft ISO standard, or
- draft ISO standard which endorses an API standard via normative reference and contains supplementary technical content<sup>3</sup>.

A draft ISO standard with only a single statement of normative reference to an API document without a supplement including technical content (i.e. 'coversheet', 'empty shell') is not acceptable.

### 5 New project

Any member of IOGP or the industry may propose a new project (either revision of existing ISO standard or new ISO standard). This proposal shall be submitted to the IOGP Standards Solution Manager using the Project Initiation Proposal (PIP) form (see Annex 2).

Any proposal for initiating a revision of an existing ISO standard should first be discussed within the ISO/TC 67 Management Committee, that determines whether to raise an NWIP in ISO/TC 67 or to raise a PIP in IOGP following the ISO fast track procedure (see Preface) including this supplementary procedure.

In case of the latter, the IOGP Standards Solution Manager will circulate the PIP within the IOGP Standards Committee and any other relevant IOGP committee, subcommittee or task force or non-IOGP organisations as agreed, for a 2- to 4-week ballot. Acceptance criteria will be as for an ISO NWIP, i.e. 2/3 approval and experts from at least five different countries (being ISO/TC 67 members) willing to prepare the draft.

The IOGP Standards Solution Manager will inform the ISO/TC 67 Secretariat, the CEN/TC 12 Secretariat, CEN/TC 234 Secretariat and where relevant the Secretariat of other Technical Committees about the results of this ballot in order to inform the ISO/TC 67 members, CEN/TC 12 members, CEN/TC 234 members and where applicable other members and invite them for participation as appropriate. The IOGP Standards Solution Manager will also inform the ISO Central

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<sup>3</sup> This option of the so-called draft ISO supplement to an API standard only applies to ISO standards with a historic link with the API standard concerned, for example where the previous edition of the ISO standard was a so-called "co-branded" standard with API. In these cases, API will provide access to the latest edition of the API standard as 'read-only' on their public portal (see: <http://publications.api.org/>) during the development process free of charge.

Secretariat about any project initiation, so that work item can be registered as PWI in the ISO Project Portal and an ISO reference can be assigned in case of new ISO standard. The IOGP Standards Solution Manager will prepare and update at regular intervals a programme of standards development under IOGP Standards Solution and post this on IOGP public website.

## **6 Establishment and disbandment of Project Team/Work Group**

The IOGP PT/WG will be established as necessary to proceed with approved new work. The PT/WG will be disbanded on the completion of its delivery. See Section 1 for structuring PTs/WGs and Section 2 for the roles of and responsibilities for PL/WG convenors and participants.

## **7 Draft development process**

### **7.1 International Standard development under IOGP (pre-DIS)**

In case the new project has been balloted and approved under IOGP, a draft DIS will be prepared by the IOGP PT/WG. The IOGP PT/WG is charged with the delivery of IOGP-developed content in accordance with agreed scope and target dates as specified in the PIP. To secure a good quality draft, the PT/WG may wish to ballot the draft within IOGP and otherwise as deemed appropriate. If so, the IOGP Standards Solution Manager will handle this process.

The PT/WG deliverables (content that will be proposed to ISO for DIS, FDIS, DTS or DTR ballot) represent the consensus of the IOGP PT/WG members, but do not necessarily represent the view or position of IOGP. Therefore, an IOGP disclaimer shall be included on the front page of the draft. The full reference of the deliverables will be: ““IOGP Draft ISO/DIS xxxxx”, “IOGP Draft ISO/FDIS xxxxx”, “IOGP Draft ISO/DTS xxxxx” or “IOGP Draft ISO/DTR xxxxx” followed by the title of the document.

Once the draft DIS is completed, it will be transmitted by the IOGP Secretariat to ISO/TC 67 through the publicly available website<sup>4</sup> to initiate the DIS ballot following the ISO fast track procedure. The ISO/TC 67 Secretariat will be informed and can obtain the DIS for ballot.

For revision of an existing ISO standard, copyright shall first be cleared with the ISO Central Secretariat if necessary. The ISO/TC 67 Secretariat will request the ISO Technical Programme Manager (TPM) to grant this copyright to IOGP for the revision process, and inform the IOGP Secretariat once copyright has been cleared.

### **7.2 International Standard development under ISO (pre-DIS)**

In case the new project has been balloted and approved under ISO, the ISO WG will prepare one or more Working Drafts (WD). Where needed, IOGP may be invited to work on an intermediate WD before submission as Committee Draft (CD) or DIS. In this case, if such work is agreed by IOGP, a PT will be established and input and comments by the IOGP PT will be transmitted by the IOGP Secretariat to ISO/TC 67 through the publicly available website<sup>5</sup>. The ISO WG preparing the WD

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<sup>4</sup> Input and comments on intermediate WDs will be uploaded to the public information folder on ISO/TC 67's webpage at <http://isotc.iso.org/livelink/livelink?func=ll&objId=8885347&objAction=browse&viewType=1>.

<sup>5</sup> Input and comments on intermediate WDs will be uploaded to the public information folder on ISO/TC 67's webpage at <http://isotc.iso.org/livelink/livelink?func=ll&objId=8885347&objAction=browse&viewType=1>.

and/or CD will be informed and can obtain the input and comments for their consideration prior to finalising the WD and/or CD.

In case a CD has been balloted, the ISO WG will resolve the comments to prepare the DIS. Where needed, the IOGP may be invited to provide observations before submission as DIS. In this case, if such work is agreed by IOGP, a PT will be established to provide observations including proposed text for the DIS that will be transmitted by the IOGP Secretariat to ISO/TC 67 through the publicly available website<sup>6</sup>. The ISO WG preparing the DIS will be informed and can obtain the observations for their consideration prior to launching the DIS.

### **7.3 Draft International Standard (DIS)**

After the DIS ballot, the ISO WG will resolve the comments to prepare the FDIS. Where needed, the IOGP may be invited to provide observations before submission as FDIS. In this case, if such work is agreed by IOGP, a PT will be established and observations by the IOGP PT including proposed text for the FDIS will be transmitted by the IOGP Secretariat to ISO/TC 67 through the publicly available website<sup>7</sup>. The ISO WG preparing the FDIS will be informed and can obtain the observations and the proposed text for the FDIS for their consideration prior to launching the FDIS.

### **7.4 Final Draft International Standard (FDIS)**

IOGP has no involvement in this stage.

## **8 Meetings**

The Chairperson of the IOGP PT/WG will administer the work and call the necessary meetings at his or her discretion. Meeting documents including but not limited to minutes will be filed as necessary using the facilities provided by IOGP Secretariat (i.e. ShareFile) and continue the ISO N-document numbering system where appropriate.

## **9 Funds**

There is no financial support of the PT/WGs. IOGP funded editing by selected contractors is available for editing draft standards at request and subject to approval by IOGP.

**Annex 1:** Simplified flowchart

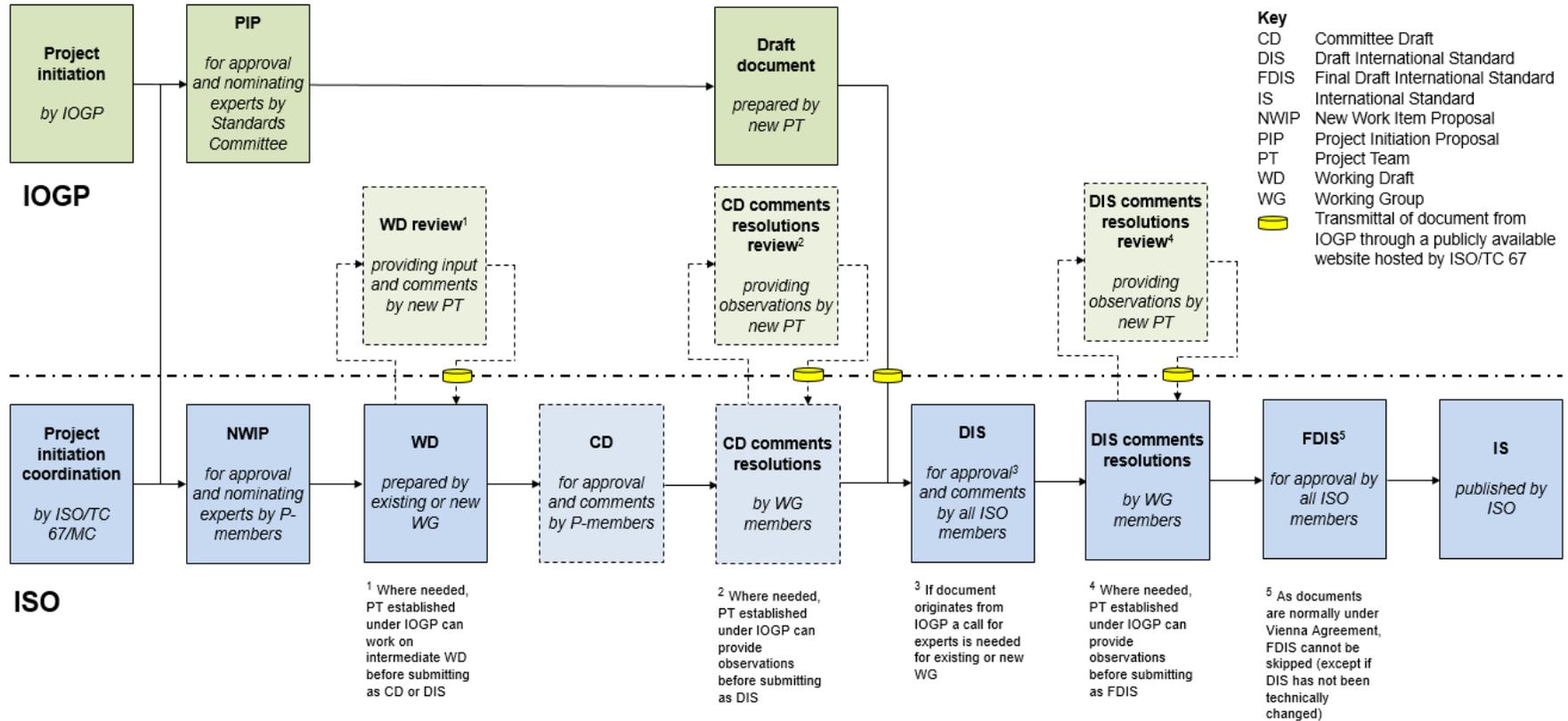
**Annex 2:** IOGP Project Initiation Proposal (PIP) form

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<sup>6</sup> Observations on the CD comments resolutions will be uploaded to the public information folder on ISO/TC 67's webpage at <http://isotc.iso.org/livelink/livelink?func=ll&objId=8885347&objAction=browse&viewType=1>.

<sup>7</sup> Observations on the DIS comments resolutions will be uploaded to the public information folder on ISO/TC 67's webpage at <http://isotc.iso.org/livelink/livelink?func=ll&objId=8885347&objAction=browse&viewType=1>.

## Annex 1 Simplified flowchart



NOTE A detailed work flow of the IOGP Standards Solution is available in the Standards Solutions Tools Box of IOGP ShareFile. This workflow includes both steps under the IOGP umbrella and steps under the ISO umbrella where relevant, and defines the tasks and responsibilities by the different actors / roles involved in developing ISO documents.

## Annex 2 IOGP Project Initiation Proposal (PIP)

A proposal for a new project under the IOGP Standards solution within the scope of materials, equipment and offshore structures for petroleum, petrochemical and natural gas industries shall be completed by the proposer and submitted to IOGP Standards Solution Manager ([StandardsSolutionPM@iogp.org](mailto:StandardsSolutionPM@iogp.org)). The proposal may both relate to the revision of an existing ISO standard or to a new topic intended to become an ISO standard using the fast track procedure<sup>8</sup>. The proposal may already include experts who have expressed their willingness to work on this new project. Representatives from embargoed countries are excluded. The proposal will be circulated to the members of the IOGP Standards Committee and other relevant bodies/persons for approval<sup>9</sup>. The IOGP Standards Committee ensures participation of experts from at least five different countries that are non-embargoed countries, as part of the approval process<sup>10</sup>.

<p><b>Title of the proposed deliverable</b></p> <p>Click here to enter text.</p> <p>NOTE In the case of an amendment, revision or a new part of an existing ISO document, show the reference number and current title.</p>
<p><b>Scope of the proposed deliverable</b></p> <p>Click here to enter text.</p>
<p><b>Purpose and justification of the proposal</b></p> <p>Click here to enter text.</p> <p>NOTE Consider the following: Is there a verified market need for the proposal? What problem does this standard solve? What value will the document bring to end-users? See also Annex C of the ISO/IEC Directives part 1.</p>
<p><b>Supplementary information relating to the proposal</b></p> <p><input type="checkbox"/> This proposal relates to a new ISO document.</p> <p><input type="checkbox"/> This proposal relates to the revision of an existing ISO document intended to remain a full-text ISO document.</p> <p><input type="checkbox"/> This proposal relates to the revision of an existing ISO document intended to become an ISO supplement with a normative reference to another document (please specify which one: <a href="#">Click here to enter text.</a>)</p>
<p><b>Preparatory work</b> (at a minimum an outline should be included with the proposal)</p> <p><input type="checkbox"/> A draft is attached      <input type="checkbox"/> An outline is attached      <input type="checkbox"/> An existing document to serve as initial basis</p> <p>The proposer or the proposer's organization is prepared to undertake the preparatory work required:</p> <p><input type="checkbox"/> Yes    <input type="checkbox"/> No</p>

<sup>8</sup> See *IOGP Supplemental Procedure for standards development* for more information

<sup>9</sup> If the proposal relates to the revision of an existing ISO standard, the ISO/TC 67 Management Committee needs first to be consulted as part of their coordinating role in maintaining ISO/TC 67's standards portfolio; see also *IOGP Supplemental Procedure for standards development*.

<sup>10</sup> This requirement is not applicable if the proposal relates to developing an ISO supplement with a normative reference to another document (e.g. an API standard that was previously co-branded with the ISO standard).

<p><b>Is this a Management Systems Standard (MSS)?</b></p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>NOTE If "Yes", once in the ISO system the NWIP along with the <a href="#">Justification study</a> (see <a href="#">Annex SL</a> of the Consolidated ISO Supplement) must be sent to the MSS Task Force secretariat (<a href="mailto:tmb@iso.org">tmb@iso.org</a>) for approval before the NWIP ballot can be launched.</p>	
<p><b>Indication(s) of the preferred type or types of deliverable(s) to be produced under the proposal</b></p> <p><input type="checkbox"/> International Standard (ISO) <input type="checkbox"/> Technical Specification (ISO/TS)</p> <p><input type="checkbox"/> Publicly Available Specification (ISO/PAS) <input type="checkbox"/> Technical Report (ISO/TR)</p>	
<p><b>Known patented items</b></p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>NOTE If "Yes", provide full information as annex. See ISO/IEC Directives, Part 1 for important guidance.</p>	
<p><b>Co-ordination of work:</b> To the best of your knowledge, has this or a similar proposal been submitted to another standards development organization?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If "Yes", please specify which one(s):</p> <p><a href="#">Click here to enter text.</a></p>	
<p><b>A statement from the proposer as to how the proposed work may relate to or impact on existing work, especially existing ISO and IEC deliverables. The proposer should explain how the work differs from apparently similar work, or explain how duplication and conflict will be minimized.</b></p> <p><a href="#">Click here to enter text.</a></p>	
<p><b>A listing of relevant existing documents at the international, regional and national levels</b></p> <p><a href="#">Click here to enter text.</a></p>	
<p><b>A simple and concise statement identifying and describing relevant affected stakeholder categories (including small and medium sized enterprises) and how they will each benefit from or be impacted by the proposed deliverable(s)</b></p> <p><a href="#">Click here to enter text.</a></p>	
<p><b>Liaisons:</b></p> <p>A listing of relevant external international organizations or internal parties (other ISO and/or IEC committees) to be engaged as liaisons in the development of the deliverable(s).</p> <p><a href="#">Click here to enter text.</a></p>	<p><b>Joint/parallel work:</b></p> <p><b>Possible joint/parallel work with:</b></p> <p><input type="checkbox"/> IEC (please specify committee ID)</p> <p><a href="#">Click here to enter text.</a></p> <p><input type="checkbox"/> CEN (please specify committee ID)</p> <p><a href="#">Click here to enter text.</a></p> <p><input type="checkbox"/> Other (please specify)</p> <p><a href="#">Click here to enter text.</a></p>
<p>NOTE This information is relevant once the project deliverable is offered to ISO for DIS ballot. ISO/TC 67 standards are usually developed under the Vienna Agreement with CEN/TC 12, so it is advised to tick the CEN box and add CEN/TC 12 to ensure that the deliverable is balloted and published in parallel.</p>	
<p><b>The proposed deliverable will be developed by:</b></p> <p><input type="checkbox"/> An existing project team (PT) / work group (WG) under IOGP (please specify which one: <a href="#">Click here to enter text.</a>)</p> <p><input type="checkbox"/> A new project team (PT) / work group (WG) under IOGP (title: <a href="#">Click here to enter text.</a>)</p>	

**A listing of members who already indicated to participate in this project**

[Click here to enter text.](#)

NOTE In case of existing project team (PT) / work group (WG) reference can be made to the distribution list in IOGP Sharefile and only new members needs to be listed.

**A listing of relevant stakeholders which are not already IOGP member that should be invited to participate**

[Click here to enter text.](#)

NOTE The IOGP Secretariat will distribute this PIP to the stakeholders listed above to see if they wish to participate in this project.

**Proposed Project Leader**  
(name and e-mail address)

[Click here to enter text.](#)

**Name of the Proposer**  
(include contact information)

[Click here to enter text.](#)

Annex(es) are included with this proposal (give details)

[Click here to enter text.](#)