

Body of Rules

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

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65 **Revision log:**

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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
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110 **1 Motivation and objective**

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

113 **1.1 Technology**

114 The IO-Link technology (or SDCI) is described in detail in the corresponding specification ([www.io-](http://www.io-link.com)
115 [link.com](http://www.io-link.com)) or in IEC 61131-9, IO-Link Safety in IEC 61139-2 and IO-Link wireless in IEC 61139-3.

116 **1.2 Fieldbus independence**

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

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

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

122

123 **2 Organization within PNO**

124 The technology is managed within the PNO in Committee C "IO-Link". The IO-Link structure with
125 all WGs (Working Groups) and PGs (Project Groups) can be found in document [A4].

126 The existing "TC/WG Guidelines" [A1], the supplemental "IPR-Rules" of the PNO containing spec-
127 ifications for handling intellectual property rights (patents and copyrights) [A2], and the "Document
128 Management" [A3] of the PNO and its bylaws also apply without exception. Supplemental rules are
129 presented in this paper and its appendices [A4] to [A10].

130 **2.1 Committee C IO-Link**

131 The Committee C IO-Link (CC IO-Link) was established - like every existing committee - by the
132 PNO Members Assembly. The leadership of the CC IO-Link is elected by the PNO Advisory Board.

133 Tasks of the CC IO-Link Leader:

- 134 • Coordination of all activities of the PNO Support Center with regard to IO-Link
- 135 • Representation of IO-Link interests in the PNO and vice versa
- 136 • Report to the PNO Advisory Board
- 137 • Representation of the IO-Link Steering Committee (SC) spokesperson

138

139

140 **3 Organization and processes of the IO-Link community**

141 The IO-Link Community is made up of IO-Link members, i.e. members of the PNO and/or the
142 Regional PI Associations (RPA) - hereinafter referred to as members of PROFIBUS&PROFINET
143 International (PI) - who actively support the IO-Link technology.

144 All members of PI can also become members of the IO-Link Community if they also recognize the
145 rules of this document in writing after acquiring PI membership.

146 If the IO-Link Community is dissolved, all rights to the IO-Link technology, results from the IO-Link
147 work and remaining financial resources from contributions are transferred to the legal successor
148 organization.

149 **3.1 IO-Link members**

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

153 All IO-Link members have the right to nominate participants in the PGs/WGs of IO-Link.

154 The IO-Link Support Center informs the CC and the PG/WG Leader about interested parties and
155 new IO-Link members.

156 Rights and obligations of IO-Link members:

- 157 • Election of the SC
- 158 • Annual information about the activities of the SC
- 159 • Annual budget information
- 160 • Contribution to technological development by participation in working groups
- 161 • Worldwide promotion of the IO-Link technology (marketing)

162 Each IO-Link member can run for election to the SC.

163 **3.2 Composition of the IO-Link Steering Committee**

164 The IO-Link members meet once a year (IO-Link General Assembly). Every 3 years, the General
165 Assembly elects a **Steering Committee (SC)**. The SC is made up of representatives of the elected
166 member companies and the heads of the IO-Link PG/WG (SC members).

167 At the IO-Link General Assembly, the member companies of the SC are elected from a proposed
168 list of candidates (electoral list). Each member company elected to the SC can nominate a repre-
169 sentative who has the right to attend SC meetings.

170 The IO-Link PG/WG Leaders proposed by the SC and confirmed by the PNO Advisory Board are
171 automatically members of the SC.

172 The number of SC members must be within the limits of 5-21. The SC has the right to increase the
173 number of its members if necessary.

174 **3.3 Tasks and rules of the IO-Link SC**

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

178 Rights and obligations of the SC:

- 179 • Election of the SC Spokesperson
- 180 • Nomination of a Leader for the CC (SC Spokesperson and CC Leader should be the same
181 person); the CC Leader is automatically a member of the SC
- 182 • Nomination of the PG/WG Leaders

- 183 • Steering of the technology development (additions to standards, profile creation, testing)
- 184 • Steering of the IEC-related activities
- 185 • Establishment of Competence and Test Centers
- 186 • Steering and approval of the actions decided in the Marketing WG
- 187 • Planning and release of financial resources
- 188 The SC meets 4 to 6 times per year, as needed.
- 189 Meeting minutes are prepared for each meeting and are stored on the IO-Link Project Server
- 190 (www.io-link-projects.com). Each IO-Link Community Member has access rights to this server.
- 191 The SC reports on its main activities and use of financial resources at the annual IO-Link General
- 192 Meeting.
- 193 Any member can submit proposals and questions to the SC. The topics raised will be handled at
- 194 one of the next meetings.
- 195 The following rules apply to the SC:
- 196 • Each company represented in the SC has only one vote.
- 197 • Proxies:
- 198 ✓ Elected SC members of member organizations (companies) can appoint a proxy in their
- 199 company to exercise the voting right
- 200 ✓ PG/WG Leaders can have their voting right exercised by a representative of their own
- 201 company as well as by a particular representative of another company.
- 202 • SC members are informed about pending decisions in a timely manner, i.e., at least 2 weeks
- 203 in advance (e-mailed invitation including agenda). The SC shall then have a quorum.
- 204 • All decisions are deemed accepted with a simple majority. Exception: organizational changes
- 205 require approval by a 2/3 majority.
- 206 **Role of the SC Spokesperson**
- 207 • Convenes the SC and the annual General Meeting.
- 208 • Serves as moderator of the SC meetings and the General Meeting.
- 209 • Performs external IO-Link communications (e.g., press, international standards committees,
- 210 other fieldbus organizations).
- 211 • Reviews conflicts regarding technology and marketing strategy reported to him and brings
- 212 about a decision.
- 213

214 **4 Conformity and Competence/Test Center**

215 Conformity/Test:

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

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

225 Competence Centers and Test Centers

226 The IO-Link Community has established Competence Centers to ensure qualified worldwide technical
227 support. Details on requirements, rights and obligations as well as the establishment process
228 can be found in the document [A.8] IOL Quality of Service Agreement. The quality of products from
229 non-members is checked by tests in established Test Centers. Rules for this can be found in
230 chapter 4.2.1 Licensing for non-members and document [A.9] Test Center Guideline.

231 **5 Membership and licensing**

232 **5.1 IO-Link membership**

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

235
236 The rights to use word marks and figurative marks (logos) (see 9) and the rights to use relevant
237 patents and property rights (see 10) are granted in accordance with the rules established in this
238 document.

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

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

243 Manufacturers have the right to use the IODD Finder only for those products for which there is a
244 manufacturer's declaration.

245 Products/product groups can be included in the "Approved Component List" (by the IO-Link Sup-
246 port Center) free of charge upon submittal of the manufacturer's declaration.

247

248 **5.2 Licensing for non-members**

249 Non-members can only market those IO-Link products and use the word/figurative mark for which
250 they have acquired a license.

251 The license model does not include the possibility of active participation in the WG/PG or access
252 to the work results of the WG/PG. This is only available to members.

253 Details on rights and obligations in connection with the acquisition of a license by a non-member
254 are described in [A6] IO-Link License Model.

255

256

257 **6 Finances/membership fees**

258 The annual determination of the financial contributions to be used for IO-Link activities is made by
259 the PNO Board of Directors in consultation with the management of the IO-Link Support Center
260 and the IO-Link Steering Committee (represented by the Steering Committee Speaker). The PNO
261 strategy, the expected income for the calendar year, the PNO expenditure required to implement
262 the PNO strategy and the requirements of the IO-Link team are taken into account. For budget
263 planning, the IO-Link Steering Committee specifies the concrete requirements with the quantified
264 projects to the IO-Link Support Center.

265 The previous regulation that the contribution can be reduced by 50% of the normal contribution
266 due for companies with up to 100 employees that are only interested in IO-Link will be canceled.

267 The prerequisite for acquiring membership is the written acceptance of the rules of this document
268 (email).

269 The PNO determines the expenditure for IO-Link and documents this information on an annual
270 basis (at the end of the calendar year). Every IO-Link member is entitled to view the data via the
271 CC IO-Link Leader.

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

274 If the budget is used up by IO-Link projects or at the decision of IO-Link members, additional
275 projects can be decided on according to "TC/WG Guidelines" [A1]. §6 of the "TC/WG-Guidelines"
276 described in detail the transaction of projects financed by IO-Link members¹.

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

279 **6.1 Appropriation**

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

281 **6.2 Release of resources**

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

285 **6.3 Cash audits**

286 At every plenary meeting of the SC, the IO-Link Support Center will inform the SC about the current
287 status of resources along with a forecast.

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

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

291

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

292 **7 Documents**

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

297 Rules for the layout, the required formal parameters, the creation and review processes, and the
298 distribution of a document are specified in the "Document Management" of the PNO [A3] and the
299 supplemental rules of the IO-Link Community [A10] „Document Management & Working Group
300 Rules“.

301 **7.1 IEC Standards**

302 The IO-Link technology is standardized in IEC 61131-9, IO-Link Safety in IEC 61139-2 and
303 IO-Link wireless in IEC 61139-3.

304 Revisions will be recorded in the IO-Link specification documents and included into the respective
305 next versions of the relevant IEC standards. In the case of discrepancies, the IO-Link specification
306 documents prevail.

307

308 **8 Marketing**

309 **8.1 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 spec-
314 ifications on web servers of other fieldbus organizations can be linked to the neutral IO-Link web
315 page in order to prevent version conflicts.

316 **8.2 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 IO-Link 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 **8.3 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 purposes
326 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 decide
328 on special rules regarding membership fees without the consent of the General Meeting.

329 **8.4 Publications**

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

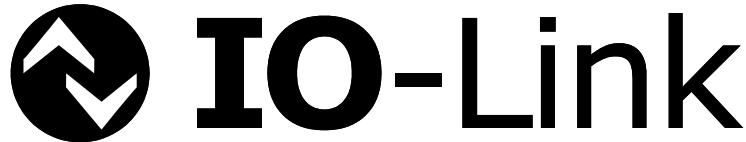
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332 **9 Word mark/figurative mark (IO-Link logo)**

333 Development and marketing of IO-Link products using IO-Link word marks/figurative marks (logos)
334 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 5)

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) 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 **10 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 devel-
366 opment.
- 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 beyond
369 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.

373

374

375

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 17.04.2023 (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 25.04.2022 (or later versions)

383 A.3 Document Management

384 [A3] Document Management Guideline of PROFIBUS Nutzerorganisation e.V., Version 1.46,
385 05.05.2021 (or later versions)

386 A.4 IO-Link Structure

387 [A4] IO-Link Organization_20230507 (or later versions)

388 A.5 IO-Link Quality Policy for all Products

389 [A5] IO-Link Product Quality Policy, Version 1.3, July 2022 (document in progress);
390 Manufacturer_declaration_MD113_20220201.docx (or later version)

391 A.6 IO-Link license model for Products of non-members

392 [A6] IO-Link License Model, Version 1.20, March 2022

393 A.7 Approved Component List

394 [A7] IO-Link Approved Component List (Approved Component List for Master) Link:
395 (<https://io-link.com/share/Downloads/Quality/Approved-Component-List-04052022.pdf>)

396 A.8 Quality of Service Agreement for IO-Link Competence Center

397 [A.8] IO-Link Quality of Service Agreement Version 1.2, December 2018 (or later versions)

398 A.9 Test Center Guideline

399 [A.9] IO-Link How to Become and to Run an Accredited IO-Link Test Center Version 1.00, March
400 2016 (or later versions)

401 A.10 Document Management & Working Group Rules

402 [A.10] IO-Link Projects Document Management & Working Group Rules Version 1.0.1, January 2020 (or
403 later versions)

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