

# Revised requirements and process for Twinning

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## New definition of twinning

The definition below is based on the wording in TMB Resolution 23/2018:

*“Twinning is a partnership agreement between two ISO members for the purposes of capacity building, where capacity building is defined as the “development of competencies (at NSB level) to be successful in ISO standardization work”.*

*The member providing the guidance, expertise and training is known as the ‘**lead partner**’.*

*The member seeking to build capacity is known as the ‘**twinned partner**’.*”

## Revised requirements for participation in twinning

- Full membership of ISO (or participation in the ISO Council’s New member rights pilot, in the case of P-member Twinning)
- Requirement to be a lead partner: demonstration of sufficient knowledge and experience (at NSB level) of the role in question.
- Requirement to be a twinned partner: demonstration of a need for capacity building, as evidenced by a lack of experience holding secretariats /appointing chairs or convenors/ participating actively in technical committees.

- Adherence to the key principles of Twinning:

### Objectives

- Both partners to the arrangement must be committed to the primary objective of twinning: to build capacity and improve participation and performance in the twinned partner.
- Twinning objectives should support those priorities identified by the twinned partner and integrated into their national development plans/strategies.

### Obligations and responsibilities

- Twinning arrangements are to be entered into voluntarily and there is no expectation that one country will provide financial support to the other country.
- Cooperation should be viewed as broadly as possible, with a flexible approach, and include technical, strategic and policy-level activities between member bodies.
- The commitment of both ISO member bodies to the twinning arrangement should be sustained for the duration of the arrangement.
- Twinning arrangements shall not jeopardize the principle of “one country, one vote” in ISO (and proxy voting is not allowed).
- Twinning arrangements shall have no influence in terms of national position. There should be no expectation that one member will support the positions and views of the other partner.

- By mutual agreement of the two ISO member bodies, the lead partner may also assume other specific administrative tasks beyond providing training and guidance.

#### Progress

- Twinning arrangements should embrace the continual improvement concept. There should be mechanisms in place to ensure that, for each action, there is a possibility for follow-up and, if necessary, corrective action.
- Projects should include indicators to measure/monitor the progress of a twinned country's participation and leadership in ISO, with progress reviewed on an annual basis.

#### Outcome

- The knowledge and experience gained through the twinning arrangement should be used to train other staff in the twinned country member to build capabilities in a sustainable manner.
  - Participation in twinning should reduce, or remove altogether, the need for twinning of the twinned partner so that, once the twinning arrangement is finished, the twinned country can participate independently.
- For leadership twinning (Convenor, Chair, Secretary), the prospective twinned partner must be a P-member of the committee concerned.

## Revised process for twinning

The 5 steps in the revised process below are based on discussions and decisions made at the February and June 2018 TMB meetings.

### 1. Application

Two ISO members agree to enter into a twinning arrangement with the lead partner agreeing to train the twinned partner in order to build up a specified set of skills/capabilities. The partners fill out a **Twinning request form**, which includes details about the experience of the lead partner and the need for capacity building of the twinned partner, plus a statement justifying why the partners wish to set up a twinning arrangement.

The partners submit the Twinning request form to the TMB secretariat along with any other supporting material (e.g. CV of proposed twinned Secretary/ Chair/ Convenor, further details of any training to be provided)

### 2. Approval

Secretariat or Chair Twinning arrangements at TC, PC or SC level shall be approved by the TMB. In these cases, the TMB secretariat sends the Twinning request form and supporting material to the TMB for approval by correspondence (CIB ballot). Supporting material for the ballot shall include an assessment from the TPM/ISO CS, plus any relevant statistics on NSB participation in ISO and performance in other committee leadership roles.

The request is evaluated by the TMB according to the quality of the information, and against the following guidelines for being a 'lead' or a 'twinned' partner:

For a 'lead' partner, suggested experience is:

- secretariat twinning, holding 5 or more committee secretariats
- chair or convenor twinning, having 5 or more appointed chairs or convenors
- P-member twinning, being a P-member in 100 or more committees.

For a 'twinned partner, the need for capacity building is evaluated based on the level of participation:

- secretariat twinning, holding fewer than 5 committee secretariats
- chair or convenor twinning, having fewer than 5 appointed chairs or convenors
- P-member twinning, being a P-member in fewer than 100 committees.

If approved by the TMB, the Secretariat or Chair Twinning arrangement is registered in the GD.

For WG Convenor Twinning arrangements, the requesting NSBs submit the Twinning request form directly to the secretariat of the parent committee for approval. The committee then submits its decision to the TPM for processing.

For P-member Twinning arrangements, the requesting NSBs submit the Twinning request form directly to the ISO/CS TPM (copied to the committee secretariat for information). The TPM reviews the form and registers the Twinning arrangement in the GD.

### 3. Planning

The twinned partners shall submit a completed **Twinning Agreement** (with end date, maximum time limit of 5 years) and **Collaboration Plan** to their ISO/CS TPM within 3 months of the registration of the Twinning arrangement.

The TPM reviews the Agreement and Collaboration Plan and works with the twinned partners to improve it, if necessary. If the partners do not submit a satisfactory Twinning Agreement and Collaboration plan within 3 months, the twinning arrangement shall not be started.

### 4. Review and performance assessment

Twinning arrangements shall be subject to an annual review and performance assessment, consisting of a self-assessment by the twinned partners, an assessment by the P-members of the committee, and an assessment by the TPM.

Once per year, the twinned partners shall submit a completed **Annual performance assessment form**. This form includes a section that will be completed by the TPM.

P-member assessments will be done as part of the regular post-meeting feedback survey process. The TPM reviews the results of these surveys and notes the P-member feedback on the Annual performance assessment form.

The TMB secretariat reviews the performance assessment forms and sends the completed forms back to the twinned partners for information. If there are no problems raised, the form is filed and the arrangement continues.

### 5. Troubleshooting and termination

Failure to submit annual performance assessments or negative assessments/ problems raised shall be brought to the attention of the TMB. The TMB evaluates the information and decides on any action to be taken. This may include the cancelation of the twinning arrangement.

Once a twinning arrangement reaches the 5-year maximum time limit, it is automatically terminated. Extensions/renewals of Twinning arrangements are not possible.

There shall be no automatic transfer of leadership roles (secretariat, chair, convenor) from the 'lead' to the 'twinned' partner at the end of the twinning arrangement. The 'twinned' partner leadership roles shall be removed from the GD.

In the case of secretariat twinning, if the lead partner wishes to relinquish the secretariat, the committee may take a resolution to support the assignment of the secretariat to the twinned partner. In the case of an SC secretariat, the TC will approve this assignment based on the SC resolution. In the case of a TC secretariat, the ISO/TMB will approve this assignment based on the TC's resolution.

Any other changes to leadership roles shall follow the approval process outlined in the ISO/IEC Directives Part 1.

### **What happens to existing Twinning arrangements?**

The new twinning rules will be published in the next edition of the ISO Supplement on 01 May 2019.

There will be a transition period for existing Twinning arrangements (established under the old rules). This transition period shall be applied as follows:

Existing Twinning arrangements shall be ended at a date which is set as 5 years after the start of the Twinning arrangement or May 2020, whichever is latest;

From May 2019, all Twinning arrangements shall submit annual performance assessments, as required by the new Twinning process.

### **When do these rules come into force?**

Any new twinning arrangements requested as from 14 June 2018 will follow the new process.

### **Addition of twinning to the ISO Supplement**

The new criteria and process for twinning will be added as an Annex to the ISO Supplement as the ISO 'Twinning policy'. The twinning guidance document will be updated to align with this new Annex.