enosema

DIRECTIVE
Directive

EFD 101:2026

Enosema Directive: Standardization and publication

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Contents

Page

Foreword ..... **v**

Introduction ..... **vi**

1 Scope **1**

2 Terms, definitions and abbreviated terms **1**
2.1 Terms and definitions 1
2.2 Abbreviated terms 3

3 Authority **3**
3.1 General 3
3.2 Board of Directors 3
3.3 Technical Coordination Board 3
3.4 Directive 4
3.5 Standard 4
3.6 Guide 4
3.7 Specification 4
3.8 Amendment 4
3.9 Technical corrigendum 4
3.10 Reports 4
3.11 Administrative 5

4 Standardization process **5**
4.1 General 5
4.2 Project stages 5
4.3 Project track 5
4.4 Project ownership 5
4.4.1 General 5
4.4.2 Transition of ownership on TC retirement 6
4.5 Project membership 6
4.5.1 General 6
4.5.2 External members 6
4.6 Project stages 6
4.6.1 Preliminary stage 6
4.6.2 Proposal stage 7
4.6.3 Preparatory stage 7
4.6.4 Committee stage 7
4.6.5 Enquiry stage 8
4.6.6 Approval stage 8
4.6.7 Draft development stages (Preparatory, Committee and Enquiry stages) 8
4.6.8 Pre-publication stages (Enquiry and Approval stages) 9
4.6.9 Publication stage 9
4.7 Abandonment 9
4.7.1 Abandonment of joint work items 9
4.8 Balloting 10
4.9 Appeals 10
4.10 Availability of working documents 10
4.11 Promotional activities in co-developed projects 10
4.12 External progression 10
4.13 Liaisons and collaborative development 11
4.14 Document requirements 11

5 Public review process **11**
5.1 General 11
5.2 Timing 11
5.3 Informal comments 11
5.4 Formal comments via the document repository 12

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5.5 Announcement channels 12
5.5.1 Eligibility 12
5.5.2 TC responsibilities 12
5.6 General 12
5.7 Formal comments 12
5.8 Informal comments 13
5.9 Resolution of comments 13
6 Corrections and amendments 13
7 Intellectual property rights 13
7.1 Free of restrictions 13
7.2 Copyright 13
7.3 Publication license 13
7.4 Member-sourced documents 13
7.5 Patented content 13
8 Maintenance of deliverables 13
8.1 Review period 13
8.2 Updates 14
8.3 New versions 14
8.4 Withdrawal 14
9 Maintenance agency and registration authority 14
9.1 General 14
9.2 Default volunteer role 14
Bibliography 15

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Foreword

The Enosema Foundation (“ES”) is the premier non-profit standardization organization for terminology standardization and terminology related processes such as management. It facilitates the education, standardization, research, promotion, definition, and usage of terminology resources and management practices globally.

ES works with international partners and experts across the globe, reflecting the international nature of its mission. More information about ES is available on the official website (https://www.enosema.org).

The procedures used to develop this document and those intended for its further maintenance are described in the ES Directives.

In particular the different approval criteria needed for the different types of ES documents should be noted. This document was drafted in accordance with the editorial rules of the ES Directives.

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ES shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be provided in the Introduction.

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

This document was prepared by the Board of Directors, supported by the Technical Coordination Board (TCB).

This document is one of the ES Directives, and it was derived from the EXPRESS Language Foundation (ELF) Directives, published under the Creative Commons Attribution 4.0 International (CC BY 4.0) license. It has been rewritten for the Enosema organization and domain.

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Introduction

ES is committed to expanding the realm of open standards for terminology, concepts, and their management across the globe and across communities of practice.

To facilitate its mission, the Enosema Board of Directors has decided to align standardization and publication processes with international best practices, such as the ISO standardization process, and the Clause 1. This document aims to achieve the said intention.

The document describes the ES standardization process, from conception, IPR policy, technical committee establishment, collaboration policies (liaisons), to the publishing of work items.

Processes described in this document contain parts that relate to all Enosema technical committees and the TCB, which carries responsibility of implementing these processes.

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Enosema Directive: Standardization and publication

1 Scope

This document formalizes the standardization and publication processes of ES.

Specifically, it describes the processes and requirements for the standardization and publication of the following document types produced by ES, including:

Directive	normative document that provides requirements for internal ES processes
Standard	normative document that provide requirements, specifications or guidelines for the public
Guide	informative internal document for Enosema technical committees
Specification	informative specification for the public
Report	informative internal or public report
Amendment	normative document that amend a published ES document
Technical corrigendum	document that describes a minor amendment of a published ES document, that does not affect the overall validity of the original document

This document does not apply to the following types of documents produced by ES, although processes described in this document can be optionally used as guidance for rigor:

— policy statements;

— internal administrative documents; and

— how-to guides. == Normative References

— [], *‚Annex 2: Decision of the Committee on Principles for the Development of International Standards, Guides and Recommendations with relation to Articles 2, 5 and Annex 3 of the Agreement; Decisions and recommendations adopted by the TBT Committee since 1 January 1995: Annexes to Part 1; _WTO Agreements Series: Technical Barriers to Trade*, World Trade Organization

2 Terms, definitions and abbreviated terms

2.1 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

ISO and IEC maintain terminology databases for use in standardization at the following addresses:

— ISO Online browsing platform: available at https://www.iso.org/obp

— IEC Electropedia: available at https://www.electropedia.org

2.1.1
standardization project
an organized process with one or more *standardization work items* (2.1.2) that contributes towards a defined scope of work

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2.1.2
standardization work item
publishable *document* (2.1.4) that relates to standardization

2.1.3
project owner
entity with authority in charge of a *standardization project* (2.1.1)

2.1.4
document
written output

2.1.5
ES deliverable
document (2.1.4) that could be an ES Standard, Guide, Specification, Report

2.1.6
ISO TC deliverable
document (2.1.4) of an ISO TC as described in ISO/IEC Directives, Part 1

Note 1 to entry: According to ISO/IEC Directives, Part 1, ISO TC deliverables include the following types: International Standards, Technical Specifications, Publicly Available Specifications and Technical Reports.

2.1.7
Enosema technical committee
ES TC
internal committee of ES tasked with a scope of work it is responsible for

2.1.8
document stage
stage of document as specified in the ISO harmonized stages (as defined in ISO/IEC Directives, Part 1, Consolidated ISO Supplement)

2.1.9
standardization project output
output of a *standardization project* (2.1.1)

Note 1 to entry: In this document, it explicitly means any documents and IP rights produced by the standardization project.

2.1.10
standardization body
standards-developing organization
SDO
entity that publishes *standardization work items* (2.1.2)

2.1.11
proposal for standardization
proposal for a new work item for standardization

2.1.12
co-develop
collaborative development
act of developing a work item by multiple parties from the proposal stage

2.1.13
co-publish
collaborative publishing
act of publishing *documents* (2.1.4) of identical content by multiple parties

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2.1.14
joint work item
work item *co-developed* (2.1.12) by both parties

2.1.15
joint publication
publication that is *co-published* (2.1.13) by ES with an external *standardization body* (2.1.10)

Note 1 to entry: Both parties may jointly hold copyright of the joint publication.

2.1.16
Enosema Board of Directors
persons serving as a Board Director for and with a statutory obligation to ES

2.1.17
Enosema Technical Coordination Board
TCB
board appointed by the Enosema Board of Directors that carries responsibility for the ES standardization and publication processes

2.1.18
Enosema Document Repository
designated repository used to store ES documents

2.2 Abbreviated terms

IPR	Intellectual Property Rights
TCB	Technical Coordination Board

3 Authority

3.1 General

The TCB is responsible for developing the corresponding processes and tools, and for their employment.

3.2 Board of Directors

The Board of Directors establishes the TCB, approves the ES Directives, and decides on appeals raised against procedural decisions taken within the ES standardization process.

3.3 Technical Coordination Board

The TCB is responsible for:

— policy development: providing recommendations to the Board of Directors on the ES standardization and publication processes;

— policy establishment: developing and supporting process documents, including:

  — this document; and

  — ES publication requirements; and

— maintenance: periodic review and perform amendments necessary to support the processes and requirements established in this document;

— execution: faithful execution and maintenance of the ES standardization process;

— enforcement: enforcing ES publication requirements on the publication of ES deliverables;

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— mediation: raising issues and problems encountered concerning the processes and procedures described in this document to the Board of Directors for further consideration; and

— coordination: supporting liaisons between Enosema technical committees and project teams with corresponding parties of external standardization bodies.

== Document types

All documents must have at least one document type, or category. A document may appear in more than one category, if appropriate.

3.4 Directive

Internal, normative documents approved by the Enosema Board of Directors, developed by the TCB, that provides requirements for internal ES processes.

3.5 Standard

Normative documents created through the ES standardization process that provide requirements, specifications or guidelines for the public.

Requirements in standards shall be based on objective performance rather than based on descriptive characteristics.

3.6 Guide

Informative, internal documents that describe guidelines for the work of Enosema technical committees.

Often a document discussing problems or issues and making suggestions for action.

3.7 Specification

Informative specifications for the public.

It could be an experimental specification intended for research and exploration, such as to encourage trial implementations, to determine its usefulness and applicability.

A published Specification deemed successful would be candidates for progression towards a Standard.

3.8 Amendment

Normative documents that amend a published ES document, such as a Standard.

3.9 Technical corrigendum

Document that describes a minor amendment of a published ES document, that does not affect the overall validity of the original document.

Could be a normative or informative document for public or internal consumption.

3.10 Reports

Informative document, reporting on an event or presenting findings of a study or research effort, which may reach conclusions but does not contain suggestions for action, except incidentally.

Intended for internal or public consumption.

EXAMPLE A report on an Enosema workshop.

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3.11 Administrative

A document type for meeting minutes, proposals to committees, policy documents, and other material, generally of an internal nature.

4 Standardization process

4.1 General

Every ES deliverable starts as a project.

An ES project goes through the following processes:

— starts with a proposal;

— the proposal is given to the approving entity for enactment;

— assigns a committee as project owner once the project is approved;

— the committee creates one or more working drafts from the proposal;

— the committee decides to endorse a committee draft;

— the approved committee draft becomes a standards draft

— the draft standard is given to the approving entity for endorsement;

— the draft standard is approved for publication as a standard.

4.2 Project stages

The following table provides a mapping between ES project stages and ISO project stages. This document identifies stages according to the ES project stage names.

Table 1 — Alignment between ISO and ES project stages

Stage identifier	ES stage	ISO harmonized stage (ISO/IEC Directives, Part 1)	ES deliverable	ISO deliverable
Preliminary	00 Preliminary	00 Preliminary	PWI	PWI
Proposal	10 Proposal	10 Proposal	NWIP	NWIP
Preparatory	20 Preparatory	20 Preparatory	WD	WD
Committee	30 Committee	30 Committee	CD	CD
Enquiry	40 Enquiry	40 Enquiry	DS	DIS
Approval	50 Approval	50 Approval	FDS	FDIS
Publication	60 Publication	60 Publication	EFS	IS
Review	90 Review	90 Review		
Withdrawal	95 Withdrawal	95 Withdrawal		

4.3 Project track

There is only one project track in ES as considered by the TCB.

4.4 Project ownership

4.4.1 General

All ES non-administrative documents must be owned by a single technical committee (the “owning” technical committee) even if two or more TCs participate in the work of developing the document.

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4.4.2 Transition of ownership on TC retirement

When a TC completes its scope of work and is shut down, the ownership of its documents moves to the TCB.

TCB may retain ownership of a document once assigned to it, or it may assign the document to a different or new technical committee, generally if follow-on work or maintenance is required on the document.

4.5 Project membership

4.5.1 General

The owning TC is responsible for maintaining expert membership of a project group.

ES members are allowed to nominate experts to the project group with approval of the owning TC.

At least one person, at most two, serves as project leader, as decided by the owning TC.

The project leader(s) shall assume project editorship unless that activity is specifically assigned to another individual.

4.5.2 External members

Individuals who are not members of ES are only allowed to participate in a project if specifically authorized by the project owning TC, in consultation with the project leader, and approved by the TCB.

4.6 Project stages

4.6.1 Preliminary stage

4.6.1.1 Initiation methods

A standardization project can be initiated in one of the following ways:

a) a project defined as part of the charter process of a TC;

b) a TC decides to create a new project as an addition to its program of work;

c) the TCB or the Board of Directors decides that a project should be initiated and assigns it to a technical committee.

4.6.1.2 Initiation requirements

When a project is initiated, the following items must be defined by the proposer as part of the proposal to the TCB:

a) scope

b) target audience

c) relevant regulatory or market needs (as feasible and appropriate) (this satisfies clause=4.a)

d) current scientific and technological developments (this satisfies clause=4.a)

e) schedule for development and publication

f) proposer, project leader

All documents other than administrative documents must have an editor or editors who are members of the technical committee(s) developing the document.

4.6.1.3 Confirmation

Once a project is confirmed initiation:

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a) the project shall be assigned a project number as decided by the TCB;

b) the project's name and stage shall be listed in the project registry (this satisfies clause=1.a); and

c) the project will be announced by the TCB to all members with a brief description of its scope (including objective and rationale) at an early enough stage that facilitates amendments and comments (this satisfies clause=1.b).

NOTE The Enosema Standards Registry supports the publication of a project registry.

4.6.1.4 First draft

A first draft of the standardization deliverable may be created for proposal submission, or may be created in the Committee stage.

Disclaimers and necessary statements such as relating to IPR and copyright shall be placed in an obvious place in the draft.

4.6.2 Proposal stage

When the TCB determines interest within ES to develop the proposed project, the project initiator should submit a proposal to the TCB for ballot indicating its wish to develop the proposed project.

If accepted, the project shall be adopted by an Enosema TC. Members of the project group shall be represented by experts. This project shall then be listed in the TCB register of projects.

If rejected, its output may still be developed by one or more members of ES if appropriate, and the resulting output may still be proposed to the TCB for development in later stages.

A "Report" document type shall be published upon a successful ballot of two-thirds approval at this stage.

4.6.3 Preparatory stage

This is an optional stage.

The goal of the preparatory stage is to create a "working draft" of the deliverable approved by the project group within the TC.

Once the project team decides the working draft has advanced to being a "committee draft" or a "draft standard", this stage ends.

There is no ballot at this stage.

4.6.4 Committee stage

This is an optional stage.

The goal of the committee stage is to create a "committee draft" of the deliverable approved by the TC.

The owning TC distributes the committee draft and may select a 8-week or 10-week comment period for TC members to comment.

Within 4 weeks of completion of the comment period, the owning TC shall distribute all formal comments received during ballot to TC members.

Given the results of comments, the Chair of the TC, considering TC consensus, in consultation with the project leader (if necessary), shall decide on the below outcomes:

a) to prepare and circulate a revised committee draft for consideration; or

b) to register the committee draft for the enquiry stage.

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In case TC consensus is unclear from the results, a ballot (4.8) can be launched to determine consensus for stage advancement.

A “Specification” document type shall be published upon advancement to the enquiry stage.

4.6.5 Enquiry stage

The goal of the enquiry stage is to create a “draft standard” of the deliverable approved by the TC.

The public review period (Clause 5) shall be started within 4 weeks of entering this stage.

Once the owning TC deems a document under development to be ready for publication, the Chair of the owning TC shall arrange for an official ballot (4.8) amongst TC members. “No” votes must be accompanied with technical reasons.

If no “No” votes were registered in the ballot, the project is deemed to have unanimous support. It shall be fast-tracked towards the Approval stage for TCB ballot.

If the ballot was successful but at least one “No” vote has been received, the project is advanced to Approval stage.

If the ballot failed, the Chair of the owning TC, in consultation with the project leader to decide whether to prepare and circulate a revised draft standard for re-balloting.

4.6.6 Approval stage

The goal of the approval stage is to create a “final draft standard” of the deliverable approved by the ES membership.

The public review period (Clause 5) shall be started within 4 weeks of entering this stage, unless the document has already been reviewed publicly at the Enquiry stage (4.6.5).

A “last call” for formal comments shall be issued by the Chair of the owning TC to both the TCB and to the full ES membership of 8 weeks.

The formal commenting process is described in detail at 5.7.

After the close of the commenting period, the Chair of TCB shall distribute the comments to the ES membership within 4 weeks of the close, and conduct a 8-week ballot (4.8) of TCB members for a vote to approve publication.

All TCB members are required to vote in this ballot. A TCB member that did not vote in the TCB poll is considered to have violated membership terms of the TCB, and has a 3-week period to rectify.

“No” votes from a TCB member must be accompanied with constructive comments.

If the ballot was successful, the project is deemed to be ready for publication and is advanced to the publication stage.

If the ballot failed, the Chair of the owning TC, in consultation with the project leader to decide whether to prepare and circulate a revised final draft standard for re-balloting.

4.6.7 Draft development stages (Preparatory, Committee and Enquiry stages)

a) Each new draft version of the document as it is developed shall be posted by the editor(s) on the Enosema Document Repository. A version is defined as a checkpoint where the developers want review from individuals other than active contributors, typically at the end of a development stage when the draft is a candidate for ballot.

b) The availability of each new draft version shall be announced to all TCs and as appropriately, to external liaison or partner working groups (this satisfies clause=1.c).

c) A draft version may be announced to the ES membership if ES-wide comment is requested (this satisfies clause=1.c).

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d) A draft version may be posted for external review and comments upon approval by TCB (see Clause 5). This is normally be done at the Enquiry and Approval stages, where the draft is considered more mature for appropriate external input.

e) Once initial approval is given by TCB, a draft may be posted for external review and comment multiple times.

In every of the development stages, resolution of all outstanding comments is required to proceed towards ballot.

4.6.8 Pre-publication stages (Enquiry and Approval stages)

Once a "draft standard" or a "final draft standard" is approved towards publication, a public review period ensues.

The public review process is described in Clause 5.

4.6.9 Publication stage

4.6.9.1 Distribution

Once TCB approves a document for publication, the Chair of the owning TC shall forward the final draft standard to the central office of ES for publication.

A standard designated for public access will be distributed on the Enosema Standards Registry (this satisfies clause=1.e).

Internal documents are made available only to members of ES via the members area of the Enosema website, and are registered in the Enosema Internal Document Register.

4.6.9.2 Dual-logo documents

A dual-logo document is a deliverable co-published by ES and an external standardization body under the marks of both parties.

For a dual-logo document, after the collaborating standardization body accepts a joint work item for publication, the joint work item will be published by ES under the corresponding document type.

4.6.9.3 Statement changes

The "boilerplate" statements of IP, appropriate usage and disclaimer will be changed to the external (public) statement.

4.6.9.4 Registration at the public document register

The name, category, version and project number of the deliverable shall be registered in the Enosema Standards Registry.

4.7 Abandonment

4.7.1 Abandonment of joint work items

A joint work item may be abandoned by one of the two parties if it sees it being inappropriate or is no longer interested or able to contribute to the joint work item. Each party is allowed to abandon the joint work, which at that point will become sole work of the other party.

A notice of such must be sent by the abandoning party to the other party and distributed by both parties to its members.

The abandoning party, if the abandoned work is carried on by the other party, is required to explicitly agree that the copyright of such work is to be waived to the other party to allow publication of the document.

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If the abandoning party wishes to rejoin an abandoned work item, it is allowed, given a notice is filed with the TCB, unless in exceptional circumstances.

4.8 Balloting

A ballot is launched upon gauging consensus within a group (TC, TCB or amongst all members).

In each ballot, a member is allocated three options:

— Yes

— No

— Abstain

A “No” vote must be accompanied by constructive comments. “Abstain” votes are not counted against the outcome.

Consensus is considered to have been reached when there are two-thirds of “Yes” votes.

4.9 Appeals

An appeal may be raised by any affected party against a procedural decision taken in the ES standardization process, including decisions taken by a technical committee or the TCB.

An appeal shall be submitted in writing to the President of ES within 30 days of the decision being announced to the ES membership or published in the corresponding Enosema document repository, stating the decision appealed against and the grounds for the appeal.

The President shall present the appeal to the Board of Directors, which considers the appeal and decides upon it.

Members of the Board of Directors who took part in the contested decision shall not take part in deciding the appeal.

The decision of the Board of Directors on an appeal is final.

4.10 Availability of working documents

Drafts and working documents are available according to each party’s normal practices.

4.11 Promotional activities in co-developed projects

Promotional programs will be shared between the collaborating parties for the purpose of coordinating marketing activities.

4.12 External progression

In some cases, ES deliverables are sent to be progressed at another standards body:

— upon completion of the Approval stage, an ES document may be sent immediately to an external standardization body for progression to become a standard; and

— if a published ES document is subsequently decided to be forwarded to another standards body for progression.

In these situations, the ES document shall be accompanied by a link at the Enosema website, that provides the document at the target standards body, completely with document number, title, etc. given by that standards body.

It is anticipated that such documents will be progressed and modified according to the processes of the recipient standards body. ES shall attempt to ensure that the link remains valid, and if possible for the most current version of the document.

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4.13 Liaisons and collaborative development

ES may co-develop and co-publish documents with external standardization bodies.

Such collaboration is governed by a collaboration agreement between ES and the collaborating party, which shall be approved by the Board of Directors.

For projects under a collaboration agreement, ES agrees to adopt a developmental track not slower than a corresponding track selected by the external standardization body to ensure synchronicity between development outcome and publication.

The project stages of the collaborating parties shall be synchronized correspondingly: if a deliverable is advanced or rejected at the external standardization body, the ES project stage shall be advanced or retained accordingly.

4.14 Document requirements

Requirements of an ES document are stated in EFD 102:2026.

5 Public review process

5.1 General

A public review period of 60 days is required for compliance to clause=1.d, which ES adheres to.

5.2 Timing

A 60-day public review shall be held in the DIS or FDIS stages of the standardization deliverable.

Under co-development, the public review shall be held on the first instance of reaching the DIS stage:

— Comments to ES shall be performed through ES's public review procedure.

— Comments to an ISO TC shall be performed according to ISO/IEC Directives, Part 1 and ISO/IEC Directives, Part 1, Consolidated ISO Supplement.

— Comments to an external standardization body shall be according to their own procedures.

The co-development parties shall agree to synchronization of the dates of review periods for the maximum benefit to the joint work item.

5.3 Informal comments

Informal comments can be solicited from and posted to ES communication channels, such as the Enosema mailing lists.

While all participants are free to contribute suggestions and comments, the actual process of development and revision of any ES document must be made by the technical committees developing the document, and by members of ES.

Participants may offer comments not only upon documents currently posted for review and comment, but upon published documents of ES.

The TCB has overall control of the public review process including what documents may be posted, the duration of postings, etc.

For details of handling informal comments, see 5.8.

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5.4 Formal comments via the document repository

Formal comments have to be submitted via the issue tracker of the corresponding Enosema document repository.

In a public review process where formal comments are received:

— the full list of formal comments is published in the issue tracker of the corresponding Enosema document repository;

— formal comments from non-ES members should be addressed and communicated to the commenter individually.

For details of handling formal comments, see 5.7.

5.5 Announcement channels

When a draft document is made available for public review, it shall be announced:

— on the public review page of the Enosema website (https://www.enosema.org/standards/public-review/); and

— on the issue tracker of the corresponding Enosema document repository.

5.5.1 Eligibility

a) At the request of the Chair of the owning TC and upon approval of the TCB, any draft intended for publication is eligible for posting to the 5.5.

b) A document or section of a document may be posted for public review and comment at any point within its development but generally it should be well-formed and close to final draft before such posting.

c) If a section of a larger document is posted to the public review page, the context of the section must be made clear so that relevant comments can be made.

d) When a document previously posted for public review is finally published, a notification of the fact will be posted to the public review page along with any title changes.

5.5.2 TC responsibilities

a) Since posting a document for public review and comment invites non-ES individuals to participate, the owning TC is responsible for monitoring comments on the public review process and acting upon them as appropriate.

b) Since any participant in the public review process may comment upon any published document at any time, the TCB will monitor the comments on such documents and bring those comments to the attention of the owning TC.

== Comments

5.6 General

The commenting process is managed by the TCB. The TCB is responsible for operating the issue tracker of the corresponding Enosema document repository and the distribution of formal comments.

5.7 Formal comments

Formal comments are binding comments where the project team whose work is being commented on must respond to.

These comments received are considered “open comments”, meaning that these comments will be published to the ES membership.

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Formal comments shall be submitted via the issue tracker of the corresponding Enosema document repository.

Formal comments on a standardization deliverable shall be shared with the owning TC within 2 weeks of receiving them.

5.8 Informal comments

These comments do not require a response from the project team whose work is being commented on.

5.9 Resolution of comments

Comments and feedback on standardization work items shall be considered impartially and judged purely according to their technical contributions to the work item.

6 Corrections and amendments

Corrections and amendments to standardization documents are considered projects themselves, and should be handled as described in Clause 4.

7 Intellectual property rights

7.1 Free of restrictions

Text of all working documents as well as co-developed/co-published deliverables will remain free of IPR restrictions that would limit their application.

7.2 Copyright

Copyright of standardization deliverables created under this document is vested in ES.

Copyright of contributions remains with their authors; contributors grant ES the license described under 7.4 for the development and publishing of the deliverables.

7.3 Publication license

In fulfilment of the commitment that the text of ES documents remains free of restrictions that would limit their application, ES makes its published documents available to the public under the Creative Commons Attribution 4.0 International Public License (CC BY 4.0).

7.4 Member-sourced documents

Authors of ES deliverables grant ES a world-wide, non-exclusive, non-sub-licensable license (except for the submission and adoption by other standardization bodies), to use contents of submitted documents to ES, for the development and publishing of the deliverables.

7.5 Patented content

Patented content in a standard will be governed by the ES patent policy (EFD 103:2026) and the ES IPR policy (EFD 105:2026).

Any patents involved knowingly in an ES deliverable must be made transparent prior to the DIS stage.

8 Maintenance of deliverables

8.1 Review period

The review period of a standardization deliverable is 5 years.

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The review shall be performed by the owning TC, if it has been disbanded, the TCB.

8.2 Updates

When a document is deemed to be updated, the owning TC shall take action to either begin the review period in order to update the document, or begin a new project to produce an amendment.

When a document is revised, any changes (as opposed to editorial corrections) should result in the document going through the same review process originally used for its publication.

A summary of changes from the previous edition should be provided at the end of the Foreword.

8.3 New versions

A document once published may undergo revision and become a new version or dot release (i.e. V1-V2 or V2.0-V2.1) under several circumstances.

8.4 Withdrawal

When a review determines that a published item should be withdrawn, it should be withdrawn from the Enosema Standards Registry list of published standards.

9 Maintenance agency and registration authority

9.1 General

ES recognizes that a maintenance agency or registration authority is required for the successful implementation of certain standardization deliverables.

9.2 Default volunteer role

The TCB shall serve as the maintenance agency or registration authority for ES standardization deliverables as necessary.

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[4] EFD 103:2026, *Enosema Directive: Patent policy*

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