



**MEMORANDUM OF UNDERSTANDING ON THE ESTABLISHMENT AND
OPERATION OF THE STATISTICAL DATA AND METADATA
EXCHANGE (SDMX) INITIATIVE**

1 MARCH 2007

CONTENTS

	PAGE
1. ESTABLISHMENT AND PURPOSE	4
2. THE SDMX SPONSORS COMMITTEE	4
3. THE SDMX SECRETARIAT	5
4. SDMX PRODUCTS	7
5. PRODUCT DISSEMINATION AND PUBLIC COMMUNICATION	7
6. INTELLECTUAL PROPERTY	8
7. RESOURCE SHARING	8
8. OTHER PROVISIONS	10

**MEMORANDUM OF UNDERSTANDING ON THE ESTABLISHMENT AND OPERATION OF
THE STATISTICAL DATA AND METADATA EXCHANGE (SDMX) INITIATIVE**

GIVEN THAT

- International organisations collectively play an important role in the global statistical community, as collectors, compilers, publishers and users of statistical information;
- International organisations spend significant staff, financial and IT resources on the exchange of data and metadata amongst themselves and with their constituencies;
- International organisations have developed specialised and proprietary arrangements, including standards, guidelines and implementation tools for the organisation of such exchanges of statistical information which have been primarily focused on business requirements of subject-matter domains or technical platforms for which they have responsibilities;
- International organisations, individually or collectively, are actively involved in and, in some cases, responsible for coordinating methodologies for various statistical domains which could benefit from cross-domain vocabularies for data and metadata structure definitions;
- National statistical agencies (in particular national statistical institutes and central banks) have asked international organisations repeatedly to cooperate in order to avoid duplication of work and to foster streamlined processing for all types of data exchange across all subject-matter domains;
- New technologies, particularly with respect to web developments, have a proven potential for improving the exchange of statistical data and metadata;
- International organisations can reduce developmental and operational costs internally and with their constituencies, by working together to achieve economies of scale through generic standards, guidelines and implementation tools for data and metadata exchange;
- International organisations individually or collectively have a number of technical or content-oriented statistical platforms that can already make use of jointly developed standards, guidelines and implementation tools (eg the BIS-IMF-OECD-World Bank Joint External Debt Hub, the BIS Data Bank, ECB dissemination of euroarea aggregates, Eurostat SDMX Open Data Interchange, IMF Dissemination Standards Bulletin Board, OECD-UN Commodity Trade Statistics);
- Standards are being developed in related domains, such as accounting information, that could benefit from a central contact point with the international statistical community;

THE BANK FOR INTERNATIONAL SETTLEMENTS, THE EUROPEAN CENTRAL BANK, THE EUROPEAN COMMISSION (EUROSTAT), THE INTERNATIONAL MONETARY FUND, THE ORGANISATION FOR ECONOMIC CO-OPERATION AND DEVELOPMENT, THE UNITED NATIONS AND THE INTERNATIONAL BANK FOR RECONSTRUCTION AND DEVELOPMENT (hereafter the Sponsor Organisations), have established a joint framework for collaboration on exchanging and sharing statistical information, being known as the Statistical Data and Metadata Exchange (SDMX) initiative.

1. Establishment and purpose

1.1 The main purposes of SDMX are to:

- a) develop, maintain and promote internationally recognised standards, guidelines and implementation tools that can facilitate the exchange of statistical data and metadata using state-of-the-art information technology;
- b) bring together and leverage the existing expertise on statistical data and metadata exchange in the Sponsor Organisations and their constituencies and avoid duplication of effort in respect of these activities;
- c) develop and promote more efficient processes for exchanging and sharing statistical data and metadata among the Sponsor Organisations and their constituencies as well as by any other collectors, compilers, processors, analysts and disseminators of statistical information;
- d) identify, share and promote good practices in the exchange and sharing of statistical data and metadata across a wide range of social and economic statistics.

1.2 SDMX builds on the strengths of the Sponsor Organisations and of other existing institutions. It is in no way designed to substitute for any of these. SDMX is not a separate entity.

1.3 Any activities conducted as part of SDMX shall be carried out consistently with the purposes, programmes of work, budget and rules of the Sponsor Organisations.

2. The SDMX Sponsors Committee

2.1 The SDMX Sponsor Organisations will be represented by the head of their statistical function on the SDMX Sponsors Committee. The members of the Sponsors Committee can be assisted or represented by deputies from their institution as appropriate.

2.2 The Sponsors Committee will:

- a) determine the strategic orientation for SDMX;

- b) coordinate the various activities of SDMX;
- c) ensure the proper development, maintenance and dissemination of SDMX products;
- d) agree on the sharing of resources amongst the Sponsor Organisations to perform the SDMX activities;
- e) promote the active use and implementation of SDMX products within their own organisations, their constituencies and the broader statistical community.

2.3 The Sponsors Committee will select its Chairperson, serving on a biennial basis. The Chairperson will be responsible for setting the agenda for the meetings of the Sponsors Committee, conducting the meetings and producing the minutes of the meetings.

2.4 The Sponsors Committee will function on the basis of consensus.

2.5 The Sponsors Committee will convene at least twice a year, at a time and place agreed by the participants; meetings can be held face-to-face as well as by tele- or videoconference.

2.6 The Sponsors Committee may invite other relevant organisations to become Sponsor Organisations. In that case the present MOU will be modified or supplemented as appropriate.

2.7 The Sponsors Committee may consult or make arrangements with other interested organisations or individual experts in areas related to statistical data and metadata exchange as appropriate.

2.8 The Sponsors Committee may create advisory and working groups, allowing other international as well as national statistical agencies to contribute to the further development of the SDMX framework through an open process.

3. The SDMX Secretariat

3.1 Support for the Sponsors Committee will be provided by the SDMX Secretariat.

3.2 Each member of the SDMX Sponsors Committee will designate one or more qualified senior experts from their organisation to assist in the work of the SDMX Secretariat.

3.3 The Sponsors Committee will nominate one or more members of the Secretariat to serve as Chairperson(s) for the Secretariat. The Chairperson(s) will be responsible for ensuring the implementation of the decisions taken by the Sponsors Committee.

3.4 The Secretariat will normally operate via electronic communication channels and teleconferences. It will maintain a list of action items resulting from its discussions and activities.

3.5 Subject to the rules and regulations of the Sponsor Organisations, the Secretariat will:

- a) collect and share information on an ongoing basis about projects and initiatives within Sponsor Organisations and their constituencies with respect to statistical data and metadata exchange;
- b) recommend to the Sponsors Committee which projects or initiatives might contribute to the development, maintenance and promotion of SDMX products;
- c) collect requirements for the development, maintenance and promotion of SDMX products from Sponsor Organisations as well as the broader community of actual and potential users of SDMX products;
- d) develop proposals for the Sponsors Committee regarding the development, maintenance and promotion of SDMX products;
- e) develop practical proposals for the Sponsors Committee regarding the possible sharing of resources amongst the Sponsor Organisations to perform the SDMX activities; monitor the agreed sharing of resources amongst Sponsor Organisations;
- f) coordinate any joint SDMX projects agreed to by the Sponsors Committee or provide guidance to projects of individual Sponsor Organisations with respect to the use of SDMX tools;
- g) develop and maintain liaison with other international organisations or initiatives that have a relationship with SDMX activities and products, including other international standards groups;
- h) assist in the organisation of the meetings of the Sponsors Committee, including the elaboration of the agenda, background documents and minutes for these meetings;
- i) assist the Sponsors Committee in actively promoting the use and implementation of SDMX products within their own organisations, their constituencies and the broader statistical community;
- j) support the implementation and contents of the SDMX website (www.sdmx.org).

3.6 The Secretariat will strive to reach consensus on any proposals to be made to the Sponsors Committee. If no consensus can be reached, proposals can be submitted to the Sponsors Committee for guidance and review.

4. SDMX Products

4.1 In order to reach its objectives, the SDMX Sponsor Organisations will develop, or promote the development of, various SDMX products including, but not limited to, technical standards, content-oriented guidelines, implementation tools, statistical registries, self-conformance tests as well as promotional and educational material.

- a) Technical standards may include statistical information models, various technical formats and architecture design for data and metadata exchange. SDMX will aim to bring such standards to the International Organization for Standardization (ISO) for review and endorsement.
- b) Content-oriented guidelines would cover, amongst others, cross-domain concepts, statistical subject-matter domains and a metadata common vocabulary.
- c) Implementation tools may involve open-source software and techniques that can assist institutions wanting to implement SDMX products, for example, in creating data structure definitions, making use of code lists, generating particular SDMX and other formats, translating between various SDMX formats, and hosting statistical registries.
- d) Implementation of statistical registries could provide the basis for centralised catalogues of SDMX common metadata concepts, subject-matter domains and related expert groups, a metadata common vocabulary and publicly available data structure definitions and code lists.
- e) Development of self-conformance tests could encourage greater awareness of the precise way in which SDMX standards and guidelines are used in particular cases of data and metadata exchange.

4.2 Promotional and educational material may include public statements, presentation material to be used by Sponsor Organisations for the promotion of SDMX, user manuals, various help notes, and public discussion fora amongst users. The maintenance of technical standards and implementation tools may require a minimal help desk function for potential users of SDMX products. Decisions on public statements should be taken by the Sponsors Committee or be the sole responsibility of the Sponsor Organisation making the statement.

4.3 Other products may be developed by SDMX as appropriate.

5. Product dissemination and public communication

5.1 All SDMX products will be made available publicly free of charge. The SDMX website will be the major communication channel for the SDMX initiative. It will actively support communication regarding the objectives and product developments of SDMX. The various SDMX products will typically be made available through the website. The Sponsors Committee will provide guidelines for the overall framework of the contents and structure of the site, which will be maintained by the Secretariat.

5.2 Upon approval of the Sponsors Committee, arrangements can be made for the dissemination of particular SDMX products through a third party service provider.

5.3 In line with international best practices, SDMX will consult widely and openly on the development and maintenance of its various products. The Sponsors Committee will establish adequate processes for the development and maintenance of SDMX products, including the terms of participation by parties other than the Sponsor Organisations. Apart from establishing advisory groups where appropriate, consultation will be organised by placing draft documents related to SDMX products on the SDMX website for public comments.

5.4 Sponsor Organisations, individually or collectively, will actively promote SDMX at existing international meetings and in existing international statistical bodies. The Sponsors Committee will also organise international meetings itself, when appropriate, to foster a wide understanding and adoption of SDMX objectives and products.

5.5 Though SDMX will not provide technical assistance for the implementation and use of SDMX products, the Sponsor Organisations will support capacity building through existing groups or initiatives in which they are active.

6. Intellectual Property

6.1 The Sponsors Committee will establish an appropriate Intellectual Property Policy, with respect to the work produced by SDMX, including but not limited to the SDMX products and the SDMX website. The Policy will address the standards development process, confirmation of ownership and responsibility from contributors to the standards development process, terms of use of the SDMX logo, disclaimer of warranty statement, the terms and conditions for the use of SDMX products, and other related matters as may be decided by the Sponsors Committee.

6.2 Intellectual property rights relating to work produced by SDMX, including but not limited to the SDMX products and the SDMX website, will be vested jointly in the Sponsor Organisations. The copyright notice will be "© SDMX" for the work produced by SDMX. Upon approval of the Sponsors Committee, one or more of the Sponsor Organisations can hold the intellectual property rights in a particular product on behalf of the other Sponsor Organisations.

6.3 The Sponsors Committee will seek trademark protection for the SDMX name and logo.

7. Resource sharing

7.1 The Sponsors Committee will review resource requirements for SDMX activities at least once each calendar year, particularly in order to address planning and resource requirements for the upcoming year. Each Sponsor Organisation will then decide on its share

of the agreed resources in accordance with their respective established internal budgetary procedures.

7.2 No separate budget will be established for SDMX. The resources needed to support SDMX activities will be equitably shared among the Sponsor Organisations and approved by the Sponsors Committee, taking account of each Organisation's expertise, capacity and priorities.

7.3 SDMX will not normally run specific projects directly. However, the Sponsor Committee may decide to name a project, in which one or more Sponsor Organisations are working on important data and metadata exchange issues and which have the potential to generate significant developments of, or improvements in, SDMX products, as an "SDMX Recognised Project". Such projects will be operated in accordance with the respective established budgetary and governance procedures of the Sponsor Organisation(s). However, other SDMX Sponsor Organisations will be permitted to nominate qualified experts from their Organisation to be involved in such a project in an advisory capacity. The SDMX Secretariat will coordinate this advisory role and brief the SDMX Sponsors Committee on developments.

7.4 The resources, as agreed by the Sponsors Committee, will mostly comprise in-kind contributions of the following nature:

- a) staff time for the activities of the Sponsors Committee and Secretariat;
- b) expertise and practical contributions from expert staff at the Sponsor Organisations that will permit SDMX to develop and maintain its various products;
- c) expertise and practical contributions from expert staff at the Sponsor Organisations to participate in SDMX-recognised projects in an advisory capacity;
- d) appropriate time and travel budgets for staff from Sponsor Organisations to attend SDMX and SDMX-related international meetings;
- e) the provision of technical infrastructure such as the SDMX website, electronic discussion fora or statistical registries;
- f) funding of specialist technical support not available within Sponsor Organisations but that is needed to develop or maintain SDMX products;
- g) the funding of various operational activities outsourced to a third-party service provider;
- h) the re-use of particular technical or analytical solutions developed in the context of SDMX Recognised Projects, or any other internal projects of the Sponsor Organisations, that will facilitate the development and maintenance of SDMX products;
- i) the organisation of international meetings to promote the use of SDMX products;

- j) support for the development, production and dissemination of promotional and educational material;
- k) capacity building efforts to support the implementation and use of SDMX products;
- l) the inclusion of SDMX-related activities in the work programme of international statistical initiatives of Sponsor Organisations that will contribute to the development, maintenance or implementation of SDMX products.

7.5 Contributions from any Sponsor Organisation should follow such Organisation's policies on this type of contribution.

7.6 Voluntary contributions for SDMX, in-kind or financial, may be accepted by the Sponsor Organisations from constituent or member institutions of the Sponsor Organisations, from the public sector or not-for-profit institutions other than Sponsor Organisations, as well as from other sources. The recipient of such voluntary contributions will promptly inform the Sponsors Committee of the receipt of such contributions.

7.7 No Sponsor Organisation undertakes to provide financial or in kind resources beyond what that Organisation has agreed to in accordance with Part 7 of this MOU.

8. Other Provisions

8.1 This MOU builds on the informal arrangements in place between the Sponsor Organisations since the launch of the SDMX initiative in 2001 and is expected to continue to evolve in response to the business requirements of international organisations and their constituencies.

8.2 This MOU may be amended by written arrangement between all Sponsor Organisations.

8.3 Any dispute relating to the interpretation or application of this MOU will be amicably settled.

8.4 It is understood that the immunities of the Sponsor Organisations are not waived by this MOU.

8.5 Any Sponsor Organisation may withdraw from this MOU by giving three (3) months prior written notice to the other Sponsor Organisations, subject to meeting its resource commitments in relation to SDMX up to the time of its effective withdrawal.

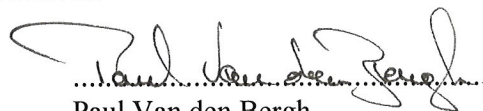
8.6 Other international organisations are welcomed to participate as Sponsor Organisations upon the agreement of the existing Sponsor Organisations.

SIGNATURES:

FOR THE BANK FOR INTERNATIONAL SETTLEMENTS



.....
William R White
Economic Adviser,
Head of Monetary and Economic Department



.....
Paul Van den Bergh
Head of Information, Statistics
and Administration

FOR THE EUROPEAN CENTRAL BANK



.....
Steven J. Keuning
Director General Statistics



.....
Werner Bier
Deputy Director General Statistics

FOR THE EUROPEAN COMMISSION (EUROSTAT)



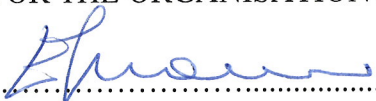
.....
Hervé Carré
Director-General

FOR THE INTERNATIONAL MONETARY FUND



.....
Robert W. Edwards
Director, Statistics Department

FOR THE ORGANISATION FOR ECONOMIC CO-OPERATION AND DEVELOPMENT



.....
Enrico Giovannini
Chief Statistician and Director of Statistics

FOR THE UNITED NATIONS



.....
Paul Cheung
Director, Statistics Division

FOR THE INTERNATIONAL BANK FOR RECONSTRUCTION AND DEVELOPMENT



.....
Shaida Badiee
Director, Development Data Group
Development Economics