
**Collaborative business relationship
management — Guidelines for
university-business collaboration**

*Management collaboratif des relations d'affaires — Lignes directrices
relatives à la collaboration université-entreprise*

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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular, the different approval criteria needed for the different types of ISO document should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

ISO draws attention to the possibility that the implementation of this document may involve the use of (a) patent(s). ISO takes no position concerning the evidence, validity or applicability of any claimed patent rights in respect thereof. As of the date of publication of this document, ISO had not received notice of (a) patent(s) which may be required to implement this document. However, implementers are cautioned that this may not represent the latest information, which may be obtained from the patent database available at www.iso.org/patents. ISO shall not be held responsible for identifying any or all such patent rights.

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

For an explanation of the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT), see www.iso.org/iso/foreword.html.

This document was prepared by Technical Committee ISO/TC 286, *Collaborative business relationship management*.

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at www.iso.org/members.html.

Introduction

With the rapid development of economic globalization, international exchanges and collaboration in education are also developing constantly. Good practices of university-business collaboration (UBC) have been formed in many other countries. This document provides guidance on the development of a sustainable UBC.

The participation of multinational business partners in UBC is becoming more common. However, there are significant differences between UBCs across different countries, and establishing a common standard for UBC will provide guidance to the varying UBC practices. Through this, different interested parties to the internationalization of UBC can clearly understand expectations, realize in-depth exchanges and collaboration in international human capital and science and technology innovation, encourage business partners to explore international markets, and promote global industrial transformation and economic development.

This document will stimulate the innovation and development of business partners, especially small and medium-sized business partners and universities, cultivate applied and innovative talents through the advantages of UBC, and improve the level of social innovation and the quality of talent employment.

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Collaborative business relationship management — Guidelines for university-business collaboration

1 Scope

This document gives guidance for universities, business partners and other interested parties on using the 12 principles of collaborative business relationships provided in ISO/TR 44000 to improve their capability in university-business collaboration (UBC).

2 Normative references

There are no normative references in this document.

3 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/>

3.1

university-business collaboration

UBC

collaboration between a university and its *business partners* (3.2), in order to achieve innovation, knowledge development, capacity building, workforce development, employment promotion and other collaborative opportunities

Note 1 to entry: The term “university” in this document refers to an institution of higher (or tertiary) education which awards academic degrees in several academic disciplines or offers vocational education, including but not limited to research-oriented university, applied university, business school, art school, college, polytechnic, higher vocational and technical university (college), and community university (college).

3.2

business partner

organization that can affect, be affected by, or perceive itself to be affected by the realization of the goal of university and business

3.3

relationship management

series of management activities, such as systems, methods, consultation mechanism and evaluations, which are carried out to achieve the collaborative relationship expected by a university, its *business partners* (3.2) and their interested parties

4 Structure of this document

This document is based on the 12 principles of collaborative business relationship given in ISO/TR 44000. For each principle there are the following three main subclauses:

- what: a summary of the intent of the principle;
- why: an explanation of its relevance to university and business;

— how: guidance on its implementation.

5 Implementation of the principles of university and business relationships management

5.1 Relationship management

5.1.1 What: Summary of the intent

Relationship management is essential to sustaining collaborative relationships that are ethical and socially responsible, and that underpin success. This does not have to be a complex process but should be one which can be easily understood and communicated across the university, business and UBC interested parties.

5.1.2 Why: Explanation of the relevance

Academia and business communities often operate very differently and can therefore have a varying focus on outcomes. The UBC should have a joint focus on agreeing and effectively managing the relationship, which can be supported by identifying and documenting a common process of engagement. A collaborative working relationship management approach helps ensure consistent operation and continual improvement due to the changes over time and in personnel. In addition, relevant personnel can clarify the management mode of UBC and the expectations of interested party through a structured and documented engagement model. It is possible to develop these relationships into a broader, interdisciplinary and lasting relationship.

5.1.3 How: Implementation guidance

5.1.3.1 Establishment of the relationship management plan (RMP)

The university and its business partners can consider establishing a system of identifying and evaluating interested parties and various relationships in the UBC, clarifying the contents and methods of relationship management, and coordinating the relationship among the members of the project.

The university and its business partners should develop a joint RMP to clarify the objectives of the UBC and its environment, and the external and internal factors of achieving their objectives. It also includes the partners, collaboration environment and interested party expectations.

The formulation of a joint RMP can be an iterative and continual optimization process.

5.1.3.2 Identifying relationships

It is important to assess the collaborative relationship and determine the mode of collaboration in all stages of the UBC, including current, future and possible collaboration.

Best practice alliance benchmarking is a continual improvement process utilized to continually seek improvement to practices. When developing relationships, both the university and its business partners should understand their individual and joint advantages from collaborative work, define where they will have sustainable relationships, and define what methods can promote the sustainable development of the UBC.

The existing or potential collaborative relationships can have different outcomes at different periods of the UBC. The university should prioritize and distinguish various types of relationships and consider where a collaborative approach can deliver maximum benefit.

5.1.3.3 Establishing organization and leadership

The UBC should establish a joint management team, including the leadership team, to clearly identify the senior administrative personnel or its designated representatives responsible for the UBC, and identify the members, their roles, responsibilities and powers.

The joint management team should build an environment to support the implementation of the UBC, including but not limited to resources, equipment, property, personnel and risk management.

The joint management team should ensure continual management and upgrading of the UBC in accordance with the objectives and governance requirements.

The joint management team can develop collaborative partners according to project needs, and establish and implement the joint RMP, so that all partners can benefit from it.

5.2 Visions and values

5.2.1 What: Summary of the intent

The visions and values of a UBC should reflect the alignment objectives and concepts of collaborative work, avoid moral or ethical clashes, and articulate the future direction, culture and values required to effectively work with business partners.

5.2.2 Why: Explanation of the relevance

Visions and values provide guidance for universities, business partners and their interested parties in order to align the direction of any development, culture, reputation, ethics and behaviour. The consistent expression of the visions and values will help collaborators and interested parties in optimizing collaborative outcomes.

5.2.3 How: Implementation guidance

5.2.3.1 Identifying the visions and values of collaboration

There are important factors that affect the development of collaborative work and the success of the UBC, including the anticipation of visions and values and the profiles of relevant parties, and potential compatibility between the university and its business partners. All interested parties to the UBC should have a clear and consistent understanding of their visions and values, and maintain a clear focus on value creation.

5.2.3.2 Implementing the visions and values of collaboration

UBC management should implement the visions and values of the university and its business partners throughout the process of collaboration. Common goals and clear responsibilities should be established for the university and its business partners. The university and its business partners should focus on internal and external objectives, which include:

- strengthening the research quality and education capacity of the university;
- strengthening institutional collaboration between university researchers and potential users of research in government, industry and communities;
- mobilizing resources for research from funding bodies while adhering to ethics guidelines;
- protecting the intellectual property rights of interested parties.

5.3 UBC objectives

5.3.1 What: Summary of the intent

The objectives of the university and its business partners can be achieved through collaborative work and is established by identifying the driving factors. The interested parties of the UBC should agree on the objectives and express them in their RMP. Interested parties should carry out their responsibilities and provide adequate resources to realize the objectives. They should also consider key elements and value embodiment of the UBC, so that they can address the differences in thoughts or behaviour that can arise in the process of collaboration.

5.3.2 Why: Explanation of the relevance

Collaboration and exchange between universities and business partners is one of the important channels for industry development and curriculum design, talent cultivation and resource mobility, and also promotes innovation in society. The effectiveness and feasibility of the objectives are the basis for restructuring any limited resources, enhancing competitive advantage, and realizing the value for the university, its business partners and UBC interested parties. Clarity of the objectives is the basis for effective collaboration and provides guidance on the implementation of activities, key points, development direction and behaviour for all parties. A clear statement of the objectives of collaboration directly contributes to the consistency of the actions and conduct of all parties.

5.3.3 How: Implementation guidance

5.3.3.1 Establishing objectives

All parties should have a clear and consistent understanding of their objectives and should consider the value of participating in the collaborative arrangement.

In the process of collaborative working involving all interested parties, each party should define its own objectives, understand the other party's objectives and find the common objectives of all parties.

This is necessary to ensure compatibility between a party's own objectives and the common objectives, achieve effective participation of all parties, and maintain mutual benefit between and among the parties.

5.3.3.2 Coordinating preparation

All parties should clarify the objectives and values of collaboration in advance, integrate resources and establish effective collaboration mechanisms. Defining the objectives ensures that the collaborative approach can be carried out better in order to improve the efficiency of the relationship and reduce the negative impact of external conditions on the partnership.

5.3.3.3 Coordinating preparation

Consideration should be given to the individual risks of collaboration for each party. The joint risks should be considered in a holistic manner.

5.3.3.4 Refining objectives

All parties should clarify the development direction of the objectives, and consider the setting of milestones.

All parties can set small, phased objectives according to the time limitation. The objectives can be divided into short-term, medium-term and long-term objectives.

All parties may set clear objectives for each sub-item according to the various contents of the collaboration.