

TRUSTED INTERMEDIARIES GUIDELINES – PILOT OUTLINE
Approved by the Working Group Members¹ on July 31, 2009
Approved by the Stakeholders' Platform on November 3, 2009

1. Background: Representatives of print-disabled persons and rightsholders have negotiated a set of guidelines to govern cross-border exchange of material protected by copyright between Trusted Intermediaries (TIs). The TI Guidelines are developed as high level principles to serve as a prototype for real life testing before finalization (the pilot phase).
2. Objective of the pilot: The Guidelines are submitted for test in a controlled and controllable time-limited environment to gain knowledge on what concrete challenges are met when exchanging material protected by copyright across borders and how these challenges can best be met in practice. The primary aim of the pilot is to
 - a. test whether the Guidelines address all relevant concerns by stakeholders;
 - b. test the TI Guidelines as a basis for the development of an international TI network that can serve both communities;
 - c. gain mutual confidence between stakeholders, while at the same time achieve some practical positive improvements on the ground.
3. Scope: The test will include a limited number of TIs in developing and developed countries, potentially scalable during the pilot period. Each organization participating in the pilot needs to subscribe to the TI Guidelines, have good standing, technical competence and sufficient funding. Experience from at least two multi-national languages will be ensured.
4. Publications: Material from two important groups of publications will be submitted on a voluntary basis - trade publications (leisure reading) and educational publications - to be included in the pilot. In line and pursuant to the application of the TI Guidelines, lawful access to the submitted materials for the intended purposes under the pilot will be provided by the TIs.
5. Duration: The pilot period is 24 months, but it can be prolonged by mutual agreement. Additional organizations and languages can be added during the pilot to enhance experiences.
6. Timetable: A pre-project phase will take place from September to December 2009. The finalization of project management and selection of the organizations will take place from January to March 2010. The pilot will start on April 1st, 2010.

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7. Project team: The project team and good project management will be negotiated during the pre-project phase.
8. Budget and resources: The budget will be drafted and negotiated during the pre-project phase. Representatives of print-disabled persons and rightsholders will study various funding alternatives and make their best to ensure sufficient funding.
9. Pilot countries: The pre-project phase will identify suitable pilot partners, based on support from local organizations representing print-disabled persons and rightsholders. It is envisaged to include countries with at least two multi-national languages. It is equally envisaged to include organizations in developing and developed countries.