

Solvoz Foundation

IP and open-access knowledge policy

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Applies to: Stichting Solvoz Foundation

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1. Purpose

This IP and Open-Access Knowledge Policy sets out how Stichting Solvoz Foundation distinguishes between proprietary technology, open-access knowledge, donor-funded content, supplier information, programme outputs and confidential information.

The Foundation exists to strengthen responsible, effective, efficient and inclusive procurement in the NGO, humanitarian, development and wider non-profit sector. Open-access procurement knowledge is an important part of that mission. The Foundation may use or support digital tools, platforms, software or other technical infrastructure where these contribute to its statutory objective. Such technology may be owned, licensed, developed or maintained by external providers, partners or other rights holders.

This policy helps ensure that knowledge created or maintained for public-benefit purposes can be shared where appropriate, while proprietary technology, supplier data, personal data, confidential information and donor-restricted content remain properly protected. This policy should be read together with the Foundation's Policy Plan, Supplier and SME Access Policy, Grant Funding Policy, Data Governance and GDPR Role Allocation Framework, Conflict of Interest Policy and Related-Party Transaction Policy, as well as relevant programme, licensing or service agreements.

2. Scope

This policy applies to intellectual property, knowledge outputs, data and content created, funded, managed, published or used by the Foundation in relation to its activities and Foundation-supported programmes and deployments. It covers:

- proprietary software and platform technology used in Foundation-supported programmes;
- Foundation-managed open-access procurement knowledge;
- donor-funded content and programme outputs;
- templates, specifications, catalogues and guidance;
- supplier data and supplier-provided information;
- public, restricted and confidential content;
- knowledge outputs created with partners, consultants or programme participants.

This policy does not replace data protection requirements, supplier terms, donor agreements, platform terms, licensing arrangements or service agreements. Where those documents contain stricter or more specific requirements, those requirements apply.

3. Core principles

The Foundation applies the following principles:

- procurement knowledge created for public-benefit purposes should be open and accessible wherever possible;
- proprietary software and technical infrastructure remain protected in accordance with applicable ownership and licensing rights;
- the use of technology in a Foundation programme does not by itself transfer intellectual property ownership to the Foundation;
- supplier data, buyer data, personal data and confidential procurement information must be handled responsibly;
- donor-funded outputs should be shared where this is allowed and aligned with the funded purpose;
- confidential, commercially sensitive, security-sensitive or personal-data-related information should not be made public without a valid basis;
- ownership, usage rights and publication rights should be documented where relevant;
- the choice of technology or service provider is determined by programme needs and is not tied to any particular commercial provider.

4. Proprietary software and technology

The Foundation may use proprietary software, platforms, digital tools or technical infrastructure where these are appropriate for a Foundation-supported programme or activity. Unless otherwise agreed in writing, intellectual property in proprietary software or technology remains with the relevant owner or rights holder. This may include:

- software code;
- platform architecture;
- APIs;
- database structures;
- platform modules and features;
- user interfaces;
- technical documentation;
- security design;
- technical configurations;
- product roadmaps;
- technical improvements, updates and bug fixes.

Where the Foundation obtains access to proprietary technology, the relevant agreement should define, where applicable:

- ownership;
- licence and usage rights;

- access rights;
- hosting and maintenance responsibilities;
- permitted users and purposes;
- development or configuration rights;
- data responsibilities;
- security requirements;
- termination and continuity arrangements.

The Foundation's use of technology does not transfer ownership of the relevant software, platform or technical intellectual property unless this has been expressly agreed. Where grant or donor funding contributes to technical improvements, configuration or development, ownership and usage rights should be determined in advance or documented in the relevant programme, grant, licensing or service agreement. Where the relevant technology owner or provider is a related party, the selection of that provider and any financial arrangements are additionally subject to the Foundation's Conflict of Interest Policy and Related-Party Transaction Policy. No technology owner or provider has an automatic, exclusive, preferred or default right to participate in future Foundation programmes.

5. Foundation-managed open-access knowledge

The Foundation may develop, maintain, support or publish open-access procurement knowledge for the humanitarian, development and wider non-profit sector. This may include:

- product and service specifications;
- category guidance;
- sourcing templates;
- practical decision support;
- procurement process guidance;
- supplier information frameworks;
- sustainability and compliance guidance;
- localisation guidance;
- market learning outputs;
- non-confidential lessons from programmes and deployments.

The Foundation's starting point is that non-confidential knowledge outputs funded or maintained by the Foundation should be made open access wherever possible, in line with the Foundation's mission. Open-access publication may be made through the Foundation website, public catalogues, shared templates, downloadable resources, reports, programme outputs or other appropriate channels.

6. Templates, specifications and catalogues

Templates, specifications, catalogues and guidance developed or maintained by the Foundation may be made available for public-benefit use where appropriate. Such resources may be:

- published openly;
- shared with eligible non-profit or public-benefit actors;
- used within Foundation-supported programmes;

- made available through appropriate sector or knowledge platforms.

Where templates, specifications or catalogues are based on donor-funded work, partner contributions, supplier input or third-party materials, the Foundation should ensure that publication and reuse are permitted.

The Foundation may update, adapt or retire published knowledge resources where needed to reflect changing standards, market developments, donor requirements, safety considerations or user feedback.

7. Donor-funded content and programme outputs

Donor-funded content and programme outputs should be managed in line with the relevant grant or donor conditions. Where possible, non-confidential donor-funded knowledge outputs should be made open access or shared for public-benefit use. Exceptions may apply where content is:

- confidential;
- security-sensitive;
- commercially sensitive;
- supplier-sensitive;
- personal-data related;
- restricted by donor or grant conditions;
- unsuitable for public release due to legal, safeguarding, procurement or operational risks.

Where a donor or funder requires specific ownership, licensing, publication or acknowledgement terms, these should be documented in the relevant grant or programme agreement. Where donor funding contributes to proprietary technology or technical development, the ownership, usage, publication and licensing rights should be explicitly addressed in the relevant agreement and should be consistent with the Foundation's public-benefit purpose and the applicable donor conditions.

8. Supplier data and supplier-provided information

Supplier data and supplier-provided information are not automatically open-access knowledge. Suppliers may provide information such as company profiles, product or service information, certifications, compliance documents, references, capacity information, technical specifications, catalogues and contact details. Such information may be used in line with the Foundation's Supplier and SME Access Policy, relevant platform or programme terms, privacy notices and deployment-specific arrangements. Supplier information may be made visible to eligible buyers, donors or programme actors within a Foundation-supported programme.

Where the supplier has consented, supplier profiles may also be made visible for other relevant Foundation-supported programmes or used to notify suppliers about relevant opportunities. Confidential, commercially sensitive or personal-data-related supplier information should not be made public unless:

- the supplier has agreed;
- disclosure is required by law or donor rules;

- or disclosure is otherwise permitted under the applicable terms.

9. Buyer, donor and procurement data

Buyer, donor and procurement data may include procurement records, RFIs, RFQs, tenders, bids, evaluations, user accounts, communications, reports and other operational information. Such information is not open-access knowledge unless it has been expressly prepared, anonymised or approved for public release. Operational procurement data should be handled in line with:

- the Foundation's Data Governance and GDPR Role Allocation Framework;
- deployment-specific data role assessments;
- relevant platform or programme terms;
- data processing agreements;
- confidentiality obligations.

The Foundation should not access or publish operational procurement data unless this is authorised, documented and aligned with applicable data protection, donor, buyer and confidentiality requirements.

10. Public, restricted and confidential content

The Foundation distinguishes between public, restricted and confidential content.

Public content may be published openly and reused for public-benefit purposes, subject to any stated conditions.

Restricted content may be shared only with certain users, partners, donors, buyers, suppliers or programme participants, for example within a specific programme or deployment.

Confidential content must not be shared beyond authorised persons.

This may include:

- personal data;
- supplier-sensitive information;
- buyer-sensitive information;
- bids and evaluations;
- security information;
- contractual information;
- non-public pricing information;
- donor-restricted information;
- proprietary materials.

Where there is doubt about whether content may be published, the Foundation should treat it as restricted or confidential until the publication rights are clarified.

11. Contributions by partners, consultants and experts

The Foundation may work with partners, consultants, experts, researchers, suppliers, buyers or programme participants to create knowledge outputs. Where such contributions are material, ownership, usage rights and publication rights should be documented in the relevant agreement,

assignment, terms of reference or programme arrangement. As a principle, contributors should understand whether their contribution may be used for:

- open-access publication;
- internal programme use;
- restricted programme or deployment use;
- research or learning purposes;
- another clearly defined purpose.

The Foundation should not publish third-party content as open access unless it has the right to do so.

12. Licensing and reuse

Where the Foundation publishes open-access knowledge, it may specify the conditions under which the material may be used, copied, adapted or shared. Such conditions may include:

- attribution requirements;
- requirements to preserve notices;
- conditions relating to redistribution;
- limitations required by donor or third-party rights;
- other reasonable terms consistent with the public-benefit purpose of the material.

The Foundation may use recognised open licences where appropriate. Specific licence choices may be determined per knowledge output or programme. Open-access publication by the Foundation does not provide users with rights to proprietary software, trademarks, confidential information or other intellectual property owned by external providers, partners or other third parties unless those rights have expressly been granted.

13. Data protection and privacy

This policy does not override data protection requirements. Personal data must be handled in accordance with applicable data protection laws, the Foundation's Data Governance and GDPR Role Allocation Framework, relevant privacy notices, data processing agreements and deployment-specific arrangements.

Before publishing knowledge outputs, the Foundation should consider whether personal data, commercially sensitive information or confidential operational data must be:

- removed;
- anonymised;
- aggregated;
- restricted;
- or withheld.

14. Use of Foundation name and third-party materials

The Foundation's name, logo, publications and materials may be used only in ways that are accurate, respectful and aligned with the Foundation's mission. Third parties may not imply

endorsement, approval, verification, partnership or funding by the Foundation unless this has been expressly agreed.

Similarly, the Foundation will respect the intellectual property, trademarks, branding and proprietary materials of external providers, programme partners and other third parties.

Where the Foundation uses third-party technology, branding, materials or intellectual property, such use is governed by the relevant rights and agreements.

Participation by an external provider in a Foundation programme does not imply that the Foundation endorses that provider generally or grants that provider a preferred position in future programmes.

15. Review

This policy should be reviewed at least once every two years, or earlier if there are material changes in:

- the Foundation's activities;
- technology or service-provider arrangements;
- donor requirements;
- open-access publication practices;
- data protection requirements;
- intellectual property arrangements;
- relevant related-party relationships.

Amendments require board approval.