

Appendix 3a to 'Multi-stage TRIZ certification regulations'
Provisions for TRIZ certification for Level 5 for research-related contribution to TRIZ development

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1. TRIZ Master qualification corresponds to level 5 and is the top professional Level within this system. Issuance of TRIZ Master diplomas to specialists, who made the largest contribution to TRIZ development, is destined to continue traditions, laid in the International TRIZ Association by its first President G. S. Altshuller.

TRIZ Master degree is conferred for research-related contribution to TRIZ development and for outstanding achievements in the field of practical application of TRIZ, or in the field of teaching TRIZ. This document applies solely to the research-oriented certification path.

TRIZ Master degree is conferred based on defended thesis.

2. All TRIZ Master diplomas, issued by MATRIZ, give equal rights to their owners, irrespective of the date of diploma issuance.
3. Every applicant for TRIZ Master certification must be first certified on Level 4.
4. To be eligible for thesis defense, each applicant must have at least two publications directly related to the thesis topic, published prior to the submission of the application.

The following publication venues are considered acceptable for this purpose:

- indexed sources, i.e. journals or conference proceedings indexed in recognized scientific databases such as SCOPUS and/or Web of Science;
- authored books on TRIZ and related methodologies, published by recognized publishers;
- TRIZ Review, the official journal of MATRIZ;
- TRIZfest conference proceedings;
- publications in professional journals;
- patents for inventions.

Regardless of the venue or type of publication, all publications submitted in support of the application must be included in the application package and made available for verification by the Council on Expertise and Methodology (CEM). Approval of the submitted publications by the CEM is a mandatory condition for admission to the certification process.

Note:

- *patents must not belong to the same patent family.*
- *utility models are not considered inventions for the purposes of this certification.*

5. Level 5 certification is granted on the basis of the defense of a thesis prepared in advance and conducted at a session of the TMCC.

6. The thesis may be authored by one or by two authors, provided that each co-author is formally applying for TRIZ Level 5 certification on the basis of the same thesis.

The thesis must be prepared personally by the listed author(s) without the involvement of any other persons.

In the case of a jointly authored thesis, all requirements applicable under the present Provisions must be fulfilled by each co-author individually.

Failure of any co-author to meet all mandatory requirements results in non-acceptance of the jointly authored thesis for defense, irrespective of whether the other co-author(s) satisfy such requirements.

The submission of a jointly authored thesis is treated as an indivisible work. After the application has been submitted, it may not be converted into a single-author submission. If one of the co-authors does not meet the certification requirements or withdraws from the process, the jointly authored thesis must not be eligible for further procedure. No applicant may claim sole authorship or proceed individually on the basis of a thesis originally prepared by more than one author.

7. Applicants for the thesis defense should pass through a pre-defense procedure that involves only the applicant(s) and the pre-defense committee members. The pre-defense may be conducted in person or online.

TMCC selects 2-3 prominent TRIZ experts who have experience in the particular area of the thesis topic. This committee performs a pre-defense and submits their recommendations to TMCC in a written form. Based on the recommendations TMCC decides whether to allow the defense or not. Members of this group could be later selected as members of the TMCC.

Some of the pre-defense committee members may be L4 TRIZ experts (no more than 30% of the committee) specializing in the topic of dissertation, and experts from science/engineering domain.

8. As a general rule, Level 5 thesis defenses are conducted during sessions held in conjunction with the international TRIZ conferences, with the personal participation of the applicant(s). This format is regarded as the preferred mode of defense.

By decision of the TMCC Chairman, the defense may be conducted online and scheduled independently of the conference dates.

9. The date and the venue of next session of TMCC is established by the Board no later than 4 months prior to the session.

10. The TMCC Chairman and Scientific Secretary are responsible for forming the composition of TMCC for the specific session (if possible, no later than a month prior to the session) that must include from 7 to 12 persons out of 12 permanent members of TMCC.

The permanent TMCC is formed for a period of 2 years from the list of TRIZ Masters. Neither the President, nor the Executive Director of MATRIZ are allowed to be a TMCC member. The list of permanent TMCC members is reviewed and approved by the Board not later than one week after submission of the list and published on MATRIZ website.

After the list of TMCC members for a specific TMCC session is approved by the Board, the information about it is published on the MATRIZ website.

The Chairman of TMCC may substitute TMCC members, who unexpectedly withdrew, for someone out of TRIZ Masters present at the TMCC session.

In the case of impossibility of an in-person presence on the defense of at least 7 permanent members of the TMCC, a virtual presence on the defense of up to 3 permanent members of the TMCC is allowed.

11. The Chairman of TMCC is appointed by the Board for the same period as the elected Board (2 years). The Chairman of TMCC directs its activities, works out the policy of functioning of TMCC, presides over TMCC sessions or appoints the Chairman of the specific session from the members of the TMCC.
12. The Scientific Secretary of MATRIZ is responsible for maintaining documentation and performing other organizational and administrative tasks related to the preparation and execution of Level 5 (TRIZ Master) certification.

In justified cases, the TMCC Chairman may appoint an Academic Secretary of TMCC to assume these responsibilities.

13. TMCC appoints opponent(s), (no more than two), of the thesis under consideration. The opponent(s) opinion should be submitted 2 weeks before the TMCC session.

Recommended structure and content of the opponent's review are as follows:

- relevance of the work,
- goals of work,
- scientific significance of obtained results (for TRIZ practitioners this item can be omitted),
- practical value of results,
- implementation of the main provisions of research,
- novelty,
- structure of thesis,
- disadvantages of the work,
- characteristics of presented work, and
- conclusion.

Note: If both official opponents provide negative opinion of the thesis, then the applicant(s) is(are) not allowed to proceed with the defense.

14. No later than three months prior to the session of TMCC, the applicant(s) must send to MATRIZ (addressed to the President and the Chairman of TMCC with a copy to the Scientific Secretary) an application in English. It must contain the following:

- a letter addressed to the President with a request to consider the application,
- contact information,
- last, first name and middle name of the applicant(s),
- number of Level 4 certificate(s) (or a copy of diploma(s) of TRIZ methodologist signed by G. S. Altshuller),

- the list of publications referred to in Section 3 of this document,
- title of the thesis,
- name and contact information of thesis scientific/research supervisor (TRIZ Master),
- short abstract of the thesis (no less than 1000 symbols), and
- a picture(s) of applicant(s).

In the case of a jointly authored thesis, the applicants must submit, together with the thesis, a written statement describing in a clear manner the individual contribution of each co-author to the research, development, results, and preparation of the thesis. This statement is an integral part of the thesis documentation and is taken into account during the pre-defense review and the defense procedure. TMCC reserves the right to request clarifications or additional evidence regarding individual contributions and to refuse admission to defense if the personal contribution of any co-author cannot be clearly established.

15. No later than six weeks prior to TMCC session, the applicant(s) must send to MATRIZ TMCC (addressed to the Chairman and to the Scientific Secretary) all information necessary for the review of the thesis:

- a thesis,
- an author's abstract,
- a review written by the research supervisor (it is acceptable to submit this review immediately prior to the TMCC session), and
- a curriculum vitae of the applicant(s).

All materials must be prepared in English.

All TMCC members must have access to all materials of the thesis.

All thesis materials (the thesis itself, the abstract, the supervisor's review, and the CV(s)) must be published on MATRIZ website within 10 days after their submission to the TMCC. Any individual TRIZ expert or regional TRIZ organization have rights to send their comments on the published thesis to the TMCC.

16. By submitting an application for Level 5 certification, the applicant(s) consents to the publication of all documents required under these Provisions on the official MATRIZ website. In the event of a successful defense and the awarding of the TRIZ Master title, this consent also applies to the publication of the thesis in the official repository of L5 theses maintained by MATRIZ on its website.

The applicant(s) further acknowledges and agrees that access to the thesis will be open and distributed under Creative Commons terms, which permit use, distribution, and reproduction in any medium, provided that the original source is properly cited.

By submitting the thesis, the applicant(s) confirms responsibility for securing all necessary permissions and licenses for any third-party materials included therein and for ensuring that such materials may be lawfully distributed under the applicable Creative Commons license.

17. Main requirements for the thesis.

The thesis is a methodological qualification work, in which the author(s) developed theoretical provisions, the set of which could be characterized as a new research achievement (e.g., a new direction of methodology development, which is identified and developed by the applicant(s); essential revision of traditional subject fields), or solved a significant research problem, or rendered substantiated solutions, the implementation of which contributes significantly to a certain field of engineering. References to the earlier works of the applicant(s) are allowed only if they were published before the defense event.

The thesis must be prepared personally by the listed author(s) without the participation of any other persons. The thesis must constitute a coherent and unified work and must represent the personal intellectual contribution of the author(s). The thesis must present a coherent and systematized conceptual framework relevant to the subject field corresponding to the thesis theme.

The thesis must meet the following criteria:

- novelty, which could be obtained either as a result of studying another subject field, or by applying new methods and means of cognition to the subject field, which was researched before, or the study of new subject field using new technologies, or by using TRIZ for solving challenging practical challenges; or implementing new training methods or materials;
- significance of the topic of research;
- instrumentality and efficiency of proposed conclusions;
- presence of practical results;
- reproducibility of results in using proposed methods.

Consistency and clarity of the thesis design and presentation are also considered important criteria for the thesis defense, in particular with regard to compliance with the formal and structural requirements set out in these Provisions.

18. The volume of the thesis should be no less than 30 pages. The volume of the dissertation abstract should be no less than 5 pages. Dissertation abstract and the thesis are presented in the electronic form.
19. Recommended structure of the thesis, dissertation abstract and review of the scientific advisor are given below:
 - Recommended structure and content of the thesis abstract is as follows:
 - general characteristic of the thesis,
 - relevance of the topic of the thesis,
 - goals and tasks of the work,
 - scientific or practical (for TRIZ practitioners) novelty of the work,
 - practical significance of the work,
 - main provisions to be discussed at the thesis defense,
 - personal contribution of the applicant(s),
 - implementation of the main provisions of research,
 - publications or patents (for TRIZ practitioners),
 - structure and volume of work.

- Recommended structure and content of the thesis is as follows:
 - introduction,
 - relevance of the topic of work
 - goals of work,
 - review of the known approaches to the analyzed problem,
 - detailed statement of the problem,
 - methods of solving the stated problem,
 - results of performed work,
 - practice of application,
 - analysis of results of performed work,
 - personal contribution of the applicant(s),
 - conclusions and recommendations on application,
 - list of published works on the topic of the thesis.
- Recommended structure and content of the advisor's review is as follows:
 - relevance,
 - goals of work,
 - main results,
 - practical value of results,
 - novelty,
 - recommendation.

20. Recommended process for the session of TMCC is as follows:

- 1.5 hours are planned for the presentation and discussion for each of the theses.
- This time budget includes short introduction of scientific/research supervisor (5 minutes), the speech of the applicant(s) (30 minutes), speeches of opponents (5 - 10 minutes each), questions to the applicant(s) and his/her answers (30 minutes), concluding speech of the Chairman of the TMCC (5 minutes).
- Questions to the applicant(s) could be asked first only by the present members of TMCC. If there are no questions from the members of TMCC, questions can be asked by other persons present at the thesis defense session within the overall time budget. The TMCC session is conducted by its Chairman or by the member of this council appointed by the Chairman.
- Before voting, the members of TMCC have a closed session to discuss the potential decision.

The session of TMCC is open for any member of TRIZ community.

21. To arrange for the organization of its work, TMCC appoints a Scrutiny Committee from its members, which consists of three people (one is appointed the Chairman of the Scrutiny Committee).

The decision to award Level 5 (TRIZ Master) certification is made by secret ballot. No fewer than seven (7) members of the TMCC must participate in the vote. The number of participating TMCC members is determined based on the number of votes cast - either by physical ballot or through an online voting system approved by the TMCC.

The following number of "YES" votes is required for a positive decision:

Number of TMCC members who took part in voting	Minimal number of "YES" votes required
12	8
10-11	7
9	6
7-8	5

Improperly filled voting ballot is considered as a "NO" vote.

TMCC members, who are scientific/research supervisors of a candidate, don't take part in voting on the thesis, in the preparation of which they participated.

TMCC has the right to make decisions on the modification of the time schedule and program of its work.

22. The Board accepts the decision of TMCC (having checked it for compliance with the provisions and regulations accepted in MATRIZ) and hands it over to the President for approval, after which the Secretariat of the President prepares and sends to new TRIZ Masters the diplomas, which are signed by the President and Chairman of the TMCC or Chairman of the TMCC session. The signatures are verified by MATRIZ seal.
23. Specialists certified for Level 5 get the TRIZ Master diplomas drawn up on a specially prepared form of MATRIZ. The ground for TRIZ Master degree conferral - the development of TRIZ as a methodology, achievements in practical application of TRIZ, or achievements in teaching TRIZ - is indicated in the diploma in addition to the name of new TRIZ Master.
24. Information on new TRIZ Masters is published at the MATRIZ website within a week after the defense of the thesis.
25. All disputable issues on the decisions of TMCC are addressed by the Board and are approved by the President.
26. The present provisions and alterations to them are accepted by the Board and approved by the President. Alterations made in the present Regulations have no retroactive effect and hence cannot be applied to decisions made before the date, on which amendments and alterations were made.