SASB Open Source Ad Hoc

June 2018 – The Hague

Phil Wennblom

From the December 2017 SASB

› The SASB Chair formed an SASB Ad Hoc on Open Source.

› Charter: <u>As a steering committee</u>, develop and implement a plan to include an open source offering within the standardization process

› Members: Phil Wennblom (Chair), one representative of ProCom, PatCom, AudCom, NesCom and RevCom [assigned by the Standing Committee Chairs], a liaison from the CAG's Ad Hoc on Open Source

› First task: Develop a plan and breakdown tasks to be done in the Standing Committees

  – It is expected that the Standing Committees will form ad hoc groups to address changes that affect their scope and responsibilities

SASB Ad Hoc on Open Source

Phil Wennblom (chair)

Dorothy Stanley (AudCom)

Stephen Dukes (NesCom)

John Kulick (PatCom)

Daleep Mohla (ProCom)

Robby Robson (RevCom)

Chuck Adams (Liaison from CAG ad hoc on open source)

Development plan (from March 2018)

- Review the CAG's white paper and evaluate what is needed for open source support in standards development process

- Develop an Open Source Software (OSS) framework, addressing top level issues

- Seek feedback on the OSS framework from CAG and pilot projects

- SASB feedback/consideration of the OSS framework

- Identify areas for standing committees to take responsibility for more detailed planning

- Review and coordinate detailed plans; address any issues

Progress since March

- Identification of issues/questions and discussion on approaches to respond to them

- Identification of dependencies on CAG's work

- Outline of a framework

- Details on sections of framework not dependent on CAG guidelines

- Today: framework proposals for:
  - References/changes to OSS
  - Intellectual property

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Framework Outline

› Introduction
  – Types of OSS used in standards
  – Documentation and code repository
  – Tools to support OSS development
› Related documents
› OSS terms and acronyms
› Governance of OSS development
› Approval to include OSS in a standard
› Intellectual property
› IEEE participation in committees outside IEEE
› Publication of OSS
› Development, Review and Ballot of OSS
› Maintenance and Modification of OSS

References/Changes to OSS (1/2)

- A reference shall specify one or more source code libraries within a specified project in a specified code repository. A reference may specify one or more specific versions, including "the most current version," of each library.

- Attention should be drawn to any code this is referenced without a specified version in the standard (template text should be developed, consider noting which version was reviewed by the Working Group (WG)).

- Normative references: Current requirements for normative references in IEEE standards apply to open source code included as a normative reference. A decision to normatively reference code without a specified version should be considered carefully by the WG. Only code developed and maintained on an IEEE open source platform may be normatively referenced without referencing specific version(s). This restriction does not apply to informative references.

References/Changes to OSS (2/2)

› Changes to normatively referenced open source code that is maintained by the WG must be approved by the WG.

› Changes to informatively referenced open source code that was developed by the WG may be made without WG approval if the process for making decisions on changes to code (reference CAG guidelines) is followed.

› Anyone submitting contributions that include written code text shall be required to sign a CLA before the contribution can be included in a draft standard.

› Review of the code on the IEEE open source platform can be restricted to the Working Group, or can be opened up to the public. However, during the Sponsor ballot, comments on code during the ballot comment periods shall be entered into the IEEE Sponsor balloting system or public review system, if applicable. During the Sponsor ballot, the source code shall be updated only to reflect the changes approved by the ballot group. Balloters submitting comments with code contributions shall sign the appropriate CLA; the comment resolution committee shall not consider any such comments until the CLA has been submitted.

Intellectual Property (1/2)

- IEEE has chosen two licenses that may be used for open source development: Apache 2.0 and BSD 3-clause version.
- Source code contributions, including from a ballot or public review comment, must be covered by a contributor license agreement (CLA)
- One of the two approved licenses shall be selected on the PAR after consultation with IEEE-SA staff. The IEEE open source platform shall inform developers of the chosen license. No other licenses are permitted without the explicit prior approval of IEEE.
- Once the PAR has been approved, a change to the selected license requires approval of a modified PAR – such changes are discouraged. Once such a modified PAR is approved, then the project is required to obtain updated CLAs from all contributors to the source code.

Intellectual Property (2/2)

› The IEEE-SA patent policy applies to open source software that is referenced in a standard, even if a CLA has been submitted.

› A call for patents notice shall be posted on the IEEE open source platform for a software development project that is referenced normatively or informatively in a draft standard, and the IEEE-SA should consider posting a video on the site to explain the call for patents process. Information about the call for patents shall be included where the CLA forms are submitted.

› The IEEE open source platform site shall have a pointer to accepted LOAs, and the web location with posted LOAs shall have a pointer to the area where CLAs are posted.

› Both LOAs and CLAs, once accepted, are irrevocable. Whether the licensing commitment indicated in an Accepted LOA is consistent with a commitment made in a CLA is left for each individual/participant to decide. WG participants should be reminded to review all sites that pertain to IP declarations (LOAs and CLAs). The IEEE-SA has no specific test for consistency.

› The IEEE open source platform shall have a pointer to the appropriate sections of the IEEE-SA Standards Board Bylaws and IEEE-SA Standards Board Operations Manual relating to intellectual property.

Next Steps

› Consider feedback from SASB and pilot projects

› Track progress of the CAG guidelines and offer feedback

› Continue development of the OSS framework; seek SASB feedback

› Identify areas for standing committees to take responsibility for more detailed planning

› Review and coordinate detailed plans; address any issues

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Thank you