Welcome
to the World
of Standards

**ETSI**
**World Class Standards**

# ETSI INDUSTRY SPECIFICATION GROUPS

**Guide for ISG "Localisation Industry Standards " (LIS) Stakeholders**

Patrick Guillemin and Gaby Lenhart, 14 May 2011

## About Standardization

Details of ISGs

Establishing the ISG

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# "Hidden" Benefits of Standardization

- Standardization contributes to consumer confidence
- Products are commercialized faster
- Products reach global markets
- Standardization does not require full manufacturing
- Standardization does not distribute forces at the expense of SMEs or research centers
- Standardization exploits research results
- Standardization ensures interoperability
- Standardization lowers the burden of evolution and maintenance, supported by industry
- Standardization improves technologies and products through multiple feed-back

# Research Input to Standards

- **ICT markets are shaped by standards**
  - de facto, industry, fora, SDOs

- **European strength in collaborative R&D**

- **European R&D in ICT must lead to standards activity**
  - Developing new products, new services, new markets
  - Driving, not disseminating

- **Input is not enough – longer term participation is required**

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# ISG Summary

- **Industry Specification Group: a special type of ETSI committee**
- **Focused activity, designed for quick establishment**
- **Decides its own work programme, approves its own deliverables**
  - ISGs produce ETSI Group Specifications (GS) only
- **All ISGs use ETSI IPR policy**
  - Well-established IPR policy, save time and legal fees compared with setting up a forum.
- **Each ISG has its own membership**
- **Each ISG has its own budget**
  - Decided and paid for by its members, invoiced to them by ETSI
  - Basic level of support from ETSI Secretariat
- **Each ISG can set its own working procedures**
  - Based on ETSI Technical Working Procedures
- **Each ISG can have its own voting system**
  - Recommended to use ETSI weighted voting, or 1 member 1 vote

# Who Can Participate?

- **Participation is governed by a Industry Specification Group Agreement**
  - Sets out the operation rules, budget mechanism, voting rules etc.

- **All ETSI members can participate, if they sign the ISG agreement**
  - Also applicant members
  - Includes agreeing to contribute to the budget according to this agreement
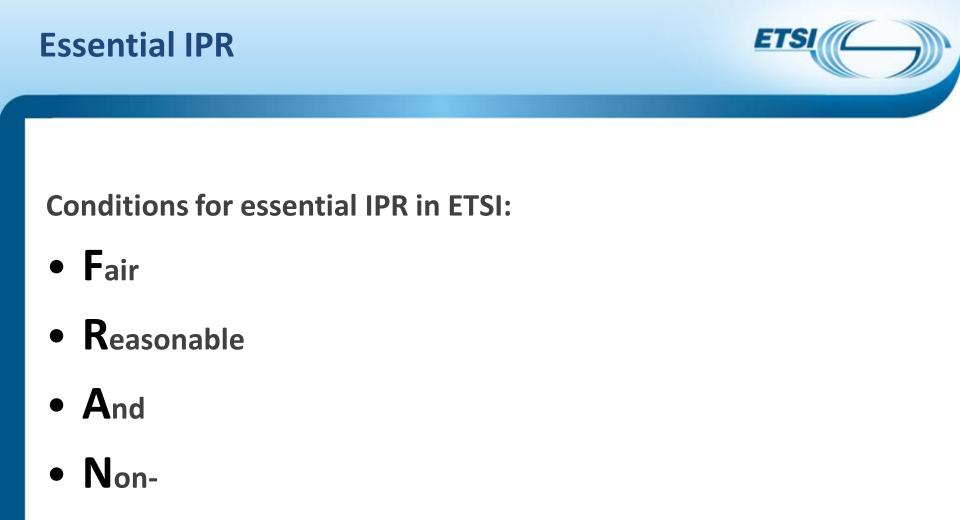  - Access to mailing lists, meeting documents etc.

- **Non-members of ETSI can participate**
  - Subject to agreement of ISG chairman, or other ETSI member parties in the ISG
  - Must sign a Participation agreement
  - Must pay a fee (per meeting)
  - Non-members of ETSI have no voting rights
  - But they have access to mailing lists, and can get meeting documents

# Who Sees What?

- **ISG existence, Scope & Terms of Reference & ISG Agreement**
  - Public
- **Meeting Docs, Draft specifications file storage area**
  - Restricted to ETSI members and ISG non-member Participants
- **E-mail lists subscription and archives**
  - Restricted to members of the ISG and ISG non-member Participants
- **Published ISG Group Specifications (GS)**
  - Public
- **ISG Work Programme Information (titles, scopes, supporting members, timescale and progress)**
  - Public
- **Past and planned meeting dates & locations**
  - Public
- **List of ISG officials (chairman etc.)**
  - Public (but only name and company and role)

# Essential IPR

Conditions for essential IPR in ETSI:

- **F**air

- **R**easonable

- **A**nd

- **N**on-

- **D**iscriminatory

# Operation of an ISG

- **Scope of activities defined by Terms of Reference**
- **ISG Rules of Procedure based on ETSI Technical Working Procedures**
  - Appointment of chair and officials
  - Participation rights
  - IPR Policy
  - Work Programme Management and document approval
  - Reporting
  - Convening a meeting, meeting procedures (changes permitted)
  - Decision Making: voting rules & procedures (changes permitted)
    - E.g. weighted or non-weighted voting
  - Liaison handling (changes permitted)
- **All available 'off the shelf' from ETSI**

# Organisation of Work

- **Internal structure: freedom to establish working groups**
- **All ETSI specification work based on Work Item concept**
  - The description of a task defined in terms of the:
    - title
    - intended deliverable type (GS only)
    - technical scope, including field of application
    - schedule of tasks for its production
    - identities of the supporting members
    - identity of the rapporteur
  - Detailed on New Work Item Form
  - WIs tracked in ETSI Work Programme Management application (public)
- **Work Item must be supported by at least four ETSI members**
- **Separate Work Item for each deliverable**
- **Work Item need not result in an ETSI deliverable**
- **ISG may request creation of a Specialist Task Force if the need is urgent and if they fund it**
- **ISG approves its own output for publication**
  - Must comply with ETSI Drafting Rules: http://portal.etsi.org/edithelp/home.asp

# ETSI Secretariat Support

● **ETSI provides 'basic support' to ISGs**

- meeting rooms with WiFi in ETSI premises
- meeting support for invitations, badges, etc. (meetings at ETSI)
- online meeting registration & meeting document handling
- tea/coffee in ETSI premises
- ISG info/meeting/document handling area on the ETSI Portal
- document storage area on the ETSI DOCBOX server (FTP & HTML access)
- one or more e-mail lists
- maintenance of the ISGs Work Items in the WPM database
- processing/publication of GSs (providing they have respected the ETSI Drafting Rules)
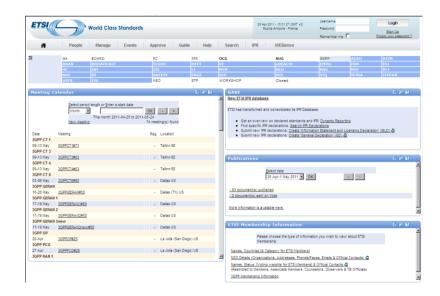
# The ETSI Portal

- **the interface for accessing information on the technical activities for each ETSI TB and ISG**

- **the Portal can either be accessed:**
  - anonymously: all public information can be consulted; or
  - with username & password
    - you can then create your own workspace

- **http://portal.etsi.org**

# ISG Budget

- **ISG can maintain its own budget**
  - Cost allocation between members detailed in ISG Agreement
  - Annual budget report & plan supplied to Secretariat
  - All expenditure performed by ETSI, invoiced to members according to ISG Agreement
- **Typical items an ISG could choose to pay for**
  - Full time support, Technical Officer support at meetings
  - Conferences or workshop or publicity event
  - Dedicated Website/domain or Wiki hosting and development
  - Technical support to committee, Technical Editor
  - ETSI Special Task Force
    - Expert development of specifications
    - Development of test specifications

# Legal

**ETSI**

- **ISG Agreement**
  - Must be signed by ETSI Members who wish to participate in the ISG
  - Between ETSI and each member of ISG
  - Identical agreement for all members
  - Binding on all members of the ISG
  - Agree to adhere to ETSI IPR Policy
  - Distribution of costs among members
  - Voting and decision making rules
  - Details specific operational rules of ISG (beyond ETSI TWP)

- **ISG Participant Agreement**
  - Must be signed by non-members of ETSI who wish to participate in ISG
  - Binding on all non-member participants to the ISG
  - Agree to adhere to ETSI IPR Policy
  - Confidentiality requirement

- **Templates of both agreements available**

# Limitations of an ISG

- **ISGs only produce ETSI Group Specifications (GS)**
  - Specifically identified as coming from an ISG

- **ISGs cannot handle activities Mandated by EC/EFTA**

- **ISGs should not handle the following**
  - health
  - safety
  - environment
  - public interest
  - basic legal/economic interests of consumer related issues

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# How to Set One up?

- **Minimum 4 ETSI members or applicant members are required**
- **Quick Operational Pack available**
  - (draft ToR, Members Agreements, Working Procedures)
- **Propose a scope for Terms of Reference, and basic workplan**
  - 2-3 paragraphs describing what the group will do
  - Need to choose a 3-letter acronym for the ISG!
- **ETSI Director General decides to establish ISG, based on documentation presented**
  - rapid decision and implementation
  - using off the shelf ETSI Portal components

# How to End it?

- **ISG becomes an ETSI Technical Body**
  - Not an end – a new beginning!
  - Pre-standardisation is over
  - Requires agreement of ETSI Board
  - Greater authority, visibility
  - Can produce TS, ES, EN specifications
  - Greater access to support and funding
  - Open to all ETSI Members
- **ISG becomes working group of existing ETSI TB**
- **ISG members choose to close group**
  - Should identify which ETSI TB/ISG handles maintenance

# Degrees of Success



**Real success: Specifications are used & implemented**

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# THANK YOU FOR YOUR ATTENTION