



2008 Open Forum for
Standards Developers



IEEE-ISTO

Industry Standards and Technology Organization
affiliated with the IEEE and the IEEE Standards Association

IEEE-ISTO – a unique “COOPERATION COMPETITION” case study

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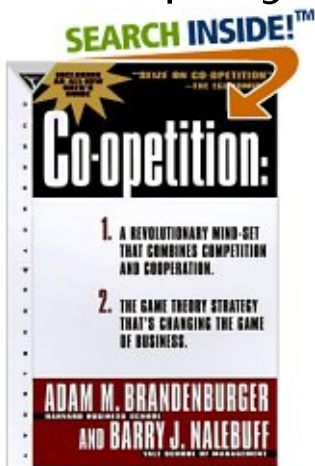
Open Forum for Standards Developers
June 24–25, 2008

Agenda

- Coop-eration Defined
- IEEE-SA + IEEE-ISTO = IEEE Standards Activities
- ISTO Background
- ISTO and SA Areas of Distinction
- Collaboration
 - IEEE International Collaboration
 - ISTO Programs and Collaboration
- Q&A

Coop-etition Defined

- ❑ “Co-opetition focuses on cooperation between companies in imperfectly competitive markets.”
- ❑ “Co-opetition can lead to a *plus-sum game*, in which the sum of what is gained by all players is greater than the combined sum of what the players entered the game with.”



1996 book, *Co-opetition*, by Harvard and Yale business professors, Adam M. Brandenburger and Barry J. Nalebuff.

“You have to compete and cooperate at the same time”

- Ray Noorda, Former Novell CEO (1983-95)

IEEE: A Change Agent

- 1890 Established the Henry—a practical unit of inductance
- 1898 First dedicated effort toward standardization of electrotechnology in US
- 1912 Institute of Radio Engineers formed its first standards committee
- 1958 Joint Standards Committee of AIEE and IRE
- 1963 Merger of AIEE and the IRE
- 1973 Establishment of the IEEE Standards Board
- ✓ 1998 IEEE Standards Association (IEEE-SA)
- ✓ 1999 IEEE Industry Standards and Technology Organization (IEEE-ISTO)
- ✓ 2004 IEEE Standards Corporate Program

IEEE-SA + IEEE-ISTO = IEEE Standards Activities

Synergies between the two organizations will produce opportunities and benefits for both that neither could enjoy alone

“Formal Standards”

IEEE-SA

- Consensus
- Openness
- Due Process
- Formal Processes



“Consortia Process”

IEEE-ISTO

- Market Driven
- Limited Consensus
 - Focused on Implementation
- Proactive Marketing
- Customized Process

IEEE has best of both worlds - able to meet the needs of its customers through complementary processes

Why the IEEE-ISTO in 1999?

- Standards environment had evolved
 - Business and market strategies rely on standards
 - IEEE must change to keep pace
- Ensure continuation of the IEEE's global recognition in standards
- IEEE's international partners were well along on this path

The IEEE-ISTO: Background

- 15 November 1998 - approved by IEEE Board of Directors (1 January 1999 Launch)
 - Formation sponsored by the IEEE-SA
 - Affiliated with the IEEE and the IEEE-SA
 - 501(c)(6) Not-For-Profit Corporation
 - Complement to the IEEE-SA
- Forum under which consortia standards development activity can be organized.
 - Flexible, alternative development processes and procedures.
 - Extends the scope of standards activities the IEEE is able to support.
 - Recognition and response to industry's standards development needs

ISTO Vision and Mission

Vision

To be the premier trusted partner of the global technology community for the **development, adoption, and certification of industry standards.**

Mission

To facilitate the life cycle of industry standards development through a staff committed to **neutrality, quality, and member satisfaction.**

2008 Board of Directors (6)

Business and affairs of IEEE-ISTO managed by its President and COO/CFO under direction of IEEE-ISTO BoD:

- Jon Adams, Director Radio Technology and Strategy, **Freescale**
- Gerald T. Lane (**Chairman**) – Director, Corporate Standards Practices, **IBM**
- Roger Martin, Director of Standards, **AOL**
- Marco W. Migliaro, President and CEO, **IEEE-ISTO**
- Bill Smith, Director, Business Alliances, **Sun Microsystems**
- Don Wright, Director of Standards, **Lexmark International**

Current ISTO Programs (12)



Promoting Open Carrier Grade
Base Platforms



LiMo Foundation



Typical Program Lifecycle

Formation / Launch



Organization and Community Development



Promotion of Deliverables and Evangelism
(e.g., Specs, Brand, Compliant Products)



Compliance and Interoperability
(e.g., Specs implemented in Products)



Time



IEEE-ISTO: Themes and Value Propositions

- ❑ Community
- ❑ Ecosystem
- ❑ Specification Creation
- ❑ Conformance and Interoperability
- ❑ Networking
- ❑ PR and Events
- ❑ Thought Leadership through Participation
- ❑ Market Driven and Relevant
- ❑ Developer Conferences
- ❑ Interoperability Events
- ❑ Promote / Foster Adoption
- ❑ Industry Awareness
- ❑ Branding
- ❑ Reduced Time to Market
- ❑ Technology Incubation
- ❑ Legal Infrastructure

Offerings and Secretariat Resources

- ❑ Strategic Planning and Implementation
- ❑ Trademarks, Intellectual Property and Licensing
- ❑ HQ Office and Identity
- ❑ Record Keeping
- ❑ Financial Management
- ❑ Membership Support
- ❑ Promotion, Marketing, and Press Relations
- ❑ Planning, Meeting Management and Forum Activities
- ❑ Publication and Document Mgmt.
- ❑ IP Mgmt. and Admin.
- ❑ Conformance and Interoperability Testing
- ❑ On-Line Support and Communications

IEEE-ISTO: Activities

- ❑ Standards development activities do not necessarily stop with the publication or approval of a standard
- ❑ Mutual goal with IEEE-SA to promote resulting standards to gain market acceptance, support implementation and product development
- ❑ IEEE-ISTO supports both development and post-development activities
 - Certification, Conformance Testing, Proactive Marketing, Branding, Interoperability Demonstrations and Plugfests, Technology Licensing

IEEE-ISTO and the IEEE-SA: Distinctions Overview

- IEEE-ISTO provides complementary services IEEE-SA cannot
- Key differences in structure:
 - Financial Model
 - Governance and Legal Status
 - Operating Procedures and Philosophies
 - Products and Support
- IEEE-ISTO extends scope and focus of IEEE's Standards Activities
 - A complement to, not a competitor with!

ISTO and SA Distinctions: Financial Model

IEEE-ISTO

- ❑ Self-supporting through fees for support and infrastructure provided to each program
- ❑ Standards to be distributed as freely as groups require and fund
- ❑ No sale of standards
- ❑ Conformity Assessment Activities
 - ISTO role as Certification Authority

IEEE-SA

- ❑ Self-supporting through sale of standards, membership, Registration Authority
 - Growing alternative revenue streams based on funded support
- ❑ Copyright and IP restrictions on distribution of standards
- ❑ Sale of standards represents revenue

ISTO and SA Distinctions: Governance and Legal Status

IEEE-ISTO

- ❑ 501(c)(6)
- ❑ Incorporated in Delaware
- ❑ License Agreement to use IEEE name and service marks
- ❑ IEEE-ISTO Board of Directors
- ❑ Bylaws and Articles of Incorporation

IEEE-SA

- ❑ 501(c)(3)
- ❑ IEEE incorporated in NY
- ❑ An IEEE entity
- ❑ Governed by:
 - IEEE BoD; IEEE-SA BoG; IEEE-SA Std.Bd.
- ❑ IEEE Bylaws and IEEE-SA Bylaws

ISTO and SA Distinctions: Procedures

IEEE-ISTO

- ❑ Tailored, flexible:
 - scope, membership, voting, consensus requirements, and structure

- ❑ Unique procedures developed and approved by Program

IEEE-SA

- ❑ Similar procedures applied to all standards activities
- ❑ ANSI and IEEE-SA principles define:
 - consensus, openness, balance and right of appeal
- ❑ Standards Board approval and review

ISTO and SA Distinctions: Products and Support

IEEE-ISTO

- IEEE-ISTO Industry Group Standards, Specifications
- Marketing
- Conformity Assessment
- Pre-development planning and research
- Products to clearly describe their origin to differentiate

IEEE-SA

- IEEE Standards
- Collections and Online Subscriptions
- Registration Authority
- Standards Information Network
- Process Support
- Editorial Support

IEEE International Collaboration

- ❑ ISO/IEC JTC1
 - 25+ years of adoption of IEEE network, operating systems, microprocessor, and software engineering standards
- ❑ IEC
 - 30% of existing IEC library built on IEEE standards
 - Current Dual Logo agreement facilitates rapid adoption: Power, Energy, Design Automation
- ❑ ISO
 - Joint project with medical devices standards
- ❑ ITU
 - Formal international recognition from radio and telecommunications sectors

ISTO Programs and Collaboration - Successes

- ❑ VoiceXML / W3C
- ❑ Liberty Alliance Project / OASIS (SAML)
- ❑ Printer Working Group / IEEE Printing Stds.

- ❑ Success dependent upon level of cooperation and common goals
 - Move beyond information exchange
 - Address IP issues up front, if necessary
 - In each case there is a complementary tangible role for each organization.
 - Overlap of work is often a (mis)perception within marketplace

Additional Information

Questions?

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