
Interoperability Demonstration Policy

Description:

Governing participation in public interoperability demonstrations that showcase multi-vendor implementations of approved OASIS work

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1. Overview

This Policy governs the planning and execution of OASIS Interoperability Demonstrations, Showcases, and Plugfests (collectively, Interops). These events feature products that support OASIS Standards and/or Committee Specifications. Usually hosted in connection with a conference, trade show or other public event, Interops are official consortium activities, endorsed by one or more OASIS Technical Committees (TCs), and mutually supported by OASIS staff and a team of participating organizations.

1.1 Goals

OASIS TCs are encouraged to host Interops in order to:

- demonstrate broad support for a standard or specification;
- promote adoption;
- identify implementation or compatibility issues;
- provide members with the opportunity to interact with prospective customers; and/or
- show how a standard can be used in a particular application, vertical market, or scenario.

1.2 Types of Interops

Interop Demonstrations (Interop Demos) show interoperability between members' products, all of which adhere to a set of technical requirements defined by the TC and/or Interop Team. Although Interop Demos require the highest level of planning and coordination among participating members, they offer a greater opportunity for identifying potential implementation and compatibility issues.

Interop Showcases provide a common venue for demonstrating members' products that support an OASIS

Standard or Committee Specification. Because full compliance with a defined demonstration scenario is not required, an Interop Showcase is easier to organize and may be more readily accessible to a broader range of members.

Interop Plugfests offer the opportunity to determine product compliance and interoperability during a public event. Participation in Interop Plugfests is open to both members and non-members of OASIS.

Note: This Policy does not cover privately held Plugfests or formal certification testing.

To compare the features of Interop Demos, Showcases, and Plugfests, see our posted [Interop Matrix](#) [1].

2. Participation

All Interops are conducted in a fair manner that reflects well on OASIS, the TC, the standard(s) employed, and all participants.

2.1. Eligibility.

(a) For Interop Demos and Showcases: All participating organizations must hold current membership in OASIS at the Foundational, Sponsor, Contributor, or Individual levels. Individual-level members who are self-employed may participate on their own behalf; Individual/Associate-level members may not participate on behalf of their employers.

The Interop Team may invite a non-commercial organization (government agency, non-profit trade association, research institution, etc.) to endorse or provide context for the demo as a Scenario Partner. OASIS membership is not required for Scenario Partners; however, their involvement must be approved by the Interop Team and by OASIS Management.

Commercial entities that are not OASIS members must join the consortium in order to participate. Members are encouraged to recommend prospective participants to OASIS staff for membership outreach.

(b) For Interop Plugfests: Participants may be members or non-members of OASIS. Members may receive a discount on the participation fee (see Section 5.1) or other exclusive benefits.

2.2. Space selection. Because space is often limited, participation is reserved on a first-in basis. Priority reservation periods based on membership level (Foundational Sponsors first, followed by Sponsors, then Contributors, then Individuals) may also be set by OASIS Management, who will confirm participation. Priority order for selecting space within the demo area is determined first by OASIS membership level, then by the submission date of the member's Interop registration form. Participation fees must be paid in full before selecting a space, and, depending on the requirements of the venue, payment may be required months in advance of the event.

2.3. Onsite staff. Each organization participating in the Interop must have at least one representative present onsite at the event. (In special cases, this requirement may be waived by advance consent of OASIS staff and the Interop Team.) Limits on the maximum number of onsite representatives may be set by OASIS to accommodate space restrictions or rules related to the venue. Onsite, all representatives are expected to behave in a professional, collegial manner. Professional business attire is required.

3. Planning and Administration

3.1. Interop Team. Each Interop shall be organized by an Interop Team composed of the participating

organizations.

3.2 Mailing list. Only the dedicated mailing list created by OASIS may be used for Interop planning and communication. Each organization participating in the Interop must have at least one representative subscribed to this list. (Subscriptions are managed by OASIS staff.) Only recognized representatives of organizations participating in the Interop may be subscribed to the Interop mailing list and attend Interop planning meetings and calls.

By default, list archives are accessible to OASIS members only. Upon request, the Interop Team may further restrict archive access to only themselves and OASIS staff so that email conversations among the Interop Team may be kept confidential.

3.2. Interop Lead. The Interop Lead works with OASIS staff to ensure the event is planned and executed in a fair, vendor-neutral, professional manner, and usually will convene meetings of the Interop Team. The Interop Lead usually (but not always) represents an organization participating in the Interop. The Interop Lead is nominated by the Interop Team and approved by Simple Majority Vote of the TC, and may be removed by Special Majority Vote of the TC. The Interop Lead's responsibilities include:

- Chair Interop planning calls (or designate alternate from the Interop Team) and ensure minutes are posted to the mailing list in a timely manner.
- Notify OASIS staff promptly of any issues or concerns that might impact the success of the event.
- Provide onsite requirements (audio/visual equipment, internet connections, etc.) to OASIS staff.
- Provide a description of the Interop for use in OASIS promotional materials.
- Review OASIS promotional materials; provide press release quote on behalf of the Interop Team.
- Act as spokesperson for briefings with press and analysts, in coordination with OASIS staff.

4. Promotion

Promotional activities conducted on behalf of the group will be coordinated solely by OASIS staff. Organizations participating in the Interop are encouraged to promote their involvement provided they do so on their own behalf.

4.1. Press release. OASIS will issue a press release in support of the event that will feature the names of all OASIS members participating in the Interop. Foundational- and Sponsor-level members may provide executive quotes for the press release. Organizations participating in the Interop may issue their own corporate press releases, provided they notify OASIS staff in advance and adhere to the [OASIS Media Relations Guidelines](#) [2].

4.2. Collateral. OASIS will produce a promotional flyer describing the Interop that will be distributed onsite. Flyers for Interop Demos and Showcases will feature information on each Interop Participant. Each organization participating in the Interop may also distribute additional collateral onsite. OASIS Management may set limits on collateral if space is restricted.

4.3. Signage. All signage used onsite will be produced by OASIS staff.

4.4. Lead collection. Electronic capture of visitor contact information will be managed solely by OASIS staff and distributed in full to all OASIS members who participate in the Interop following the event.

5. Expenses

Interops are designed to be self-supporting activities.

5.1. Participation fee. To meet expenses, each organization participating in the Interop is required to pay a non-refundable participation fee. The amount and deadline for payment is determined in advance by OASIS staff, based on projected venue costs and anticipated number of participants. The fee may cover:

- Space rental
- Signage
- Collateral
- Audio-visual equipment rentals
- Connectivity (internet/intranet)
- Furniture rental
- OASIS press release distribution
- Staff support
- Other expenses

5.2. Contracting services. All financial and logistical matters are managed by OASIS staff. Interop participants may not enter into agreements or negotiate contracts on behalf of the group.

5.3. Donations. An OASIS Member Section, Interop participant, or other party may offer to co-sponsor the event by underwriting expenses or making a major donation of equipment or services. If the TC and OASIS Management agree to accept such contributions, the donor(s) may be recognized in the event promotion.

6. Additional requirements for Interop Demos and Plugfests only

The decision to conduct the Interop is made by the TC(s) responsible for the standard(s) or specification(s) demonstrated. The TC may also set broad parameters and instructions for the Interop (such as the version of the specification, the test payloads that will be used, and the testing milestones that must be met by participants during the testing cycle calendar) by a Simple Majority Vote of the TC. However, (a) no material changes may be made to those instructions later than 30 days prior to the start of the Interop event; (b) neither the TC nor the Interop Team may establish any additional procedural rules for the Interop, without the advance review and discretionary approval of OASIS TC Administration; and (c) none of those instructions or rules may contradict these OASIS rules. Additionally, the version number(s) of the specification(s) to be demonstrated must be specified in the TC's initial approval of the event, no less than 90 days before the event, and may not be varied thereafter without the unanimous approval of all participants.

7. Additional requirements for Interop Demos only

7.1. Interoperability criteria. The Interop Team collaborates to determine fair conformance or interoperability criteria, making reasonable efforts to accommodate products from all organizations participating in the Interop.

Once the basic requirements have been defined by the TC, and subject to any other matters determined by the TC under Section 6, all other technical decisions are made collectively by the Interop Team.

Most decisions may be made by Simple Majority Vote (one vote per participating organization) via email or during Interop Team meetings, which must be announced at least three days in advance. Results of Simple Majority Votes shall be recorded on the Interop mailing list by the Interop Team Lead or designated secretary.

Major decisions (changes to test criteria, approvals of test results, and other decisions that affect the ability of members to participate in the Interop Demo) shall be made by a Special Majority Vote run as an electronic ballot by the OASIS TC Administrator. Special Majority Voting for Interop Demos is held in accordance with

the [OASIS TC Process\[3\]](#) except that there shall be one vote per participating organization and the ballots may be closed by the TC Administrator after all participating organizations have voted or after three days, whichever occurs first. Results of electronic ballots shall be recorded on the Interop mailing list by the OASIS TC Administrator.

7.2. Inability to meet requirements. OASIS is unable to refund participation fees based on failure to meet demo requirements. In the event a member has been admitted as a participant but its product is unable to meet the technical demo requirements, as determined by the final approved Interop Demo results, then the member retains the option to showcase its product within the OASIS space, provided: 1) OASIS Management approves participation; 2) the participant's showcase is clearly marked as distinct from the Interop Demo in a matter determined by OASIS Management; and 3) the member demonstrates its product in a manner that does not misrepresent or detract from the Interop Demo. Any such showcasing member will not be promoted as part of the Interop Demo.

7.3. Deadlines. OASIS staff, in consultation with the Interop Team, may set an initial deadline for confirming participation to allow sufficient time for the group to prepare the demonstration. Every effort will be made to fill the space by this deadline; however, if additional Interop members are needed to cover event expenses, OASIS Management may allow them to join after the deadline. Any member joining after the initial deadline will still have to meet the requirements such as test milestones set by the TC and the Interop Team in order to be included in the Interop Demo. If there is a formal Interop test process, then, if a vacancy exists after that test deadline has passed, new Interop Demo participants only may be added with the approval of the Interop Team by Special Majority Vote.

The Interop Team may set additional deadlines for accomplishing milestones related to demo preparation.

7.4. Onsite staff at event. Each organization participating in an Interop Demo must have at least one representative present onsite at the organization's installation, and during the active hours of the event (as determined by OASIS Management). OASIS reserves the right to partially or wholly remove installations not complying with that requirement.

7.5 Confidentiality agreements. Subject to advance approval by OASIS Management, the TC or Interop Team may specify that all participants must agree in advance that all implementation capabilities and test results will remain confidential within the Interop Team. (Note that any information posted to the TC becomes public due to OASIS transparency rules.) Any such confidentiality requirements may also permit a public release of a specified form of final results, so long as (a) those final results and the form in which they are released are approved by the Interop Team, at least five days prior to the start of the event, and (b) any references to participants whose products did not pass a test may be included in any such public release or statement only with the explicit permission of that participant.

8. Additional provisions

In addition to this Policy, the OASIS Bylaws, and other OASIS policies, procedures, and guidelines apply. An Interop Team may specify additional provisions if required to address unique needs of its demonstration, subject to advance review and discretionary approval of OASIS Management. Any disputes regarding matters arising under these rules shall be referred to and resolved by (a) the OASIS TC Administrator as to procedural issues and (b) OASIS Management otherwise.

The OASIS Board of Directors may amend this Policy at any time at its sole discretion.

Contact events@oasis-open.org with questions or issues.

Previous versions of this Policy were posted on [2015-02-03](#) [4], [2013-10-18](#) [5], [2010-12-07](#) [6], and [2010-07-24](#)[7].

Dates

Approved:

Tue, 2017-02-28

Effective:

Tue, 2017-02-28

Related links:

[Interop Matrix](#) [1]

[Interop Homepage](#) [8]

Links:

[1] <https://www.oasis-open.org/events/interop-matrix>

[2] http://www.oasis-open.org/news/media_relations_policy.php

[3] <https://www.oasis-open.org/policies-guidelines/tc-process#voting>

[4] https://www.oasis-open.org/node/80/revision_tags/3811/view

[5] https://www.oasis-open.org/node/80/revision_tags/3091/view

[6] https://www.oasis-open.org/node/80/revision_tags/834/view

[7] https://www.oasis-open.org/node/80/revision_tags/313/view

[8] <https://www.oasis-open.org/events/interop>