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IAB Processes for Management of IETF Liaison Relationships
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Abstract

This document discusses the procedures used by the IAB to establish and maintain formal liaison relationships between the IETF and other Standards Development Organizations (SDOs), consortia and industry fora. This document also discusses the appointment and responsibilities of IETF liaison managers, and the expectations of the IAB in establishing liaison relationships.

About This Document

This note is to be removed before publishing as an RFC.

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Source for this draft and an issue tracker can be found at
<https://github.com/intarchboard/draft-iab-rfc4052bis>.

Status of This Memo

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1. Introduction

The IETF, as an organization, has the need to engage in direct communication or joint work with various other formal organizations. For example, the IETF is one of several Standards Development Organizations, or SDOs, and SDOs including the IETF find it increasingly necessary to communicate and coordinate their activities involving Internet-related technologies. This is useful in order to avoid overlap in work efforts, and to manage interactions between their groups. In cases where the mutual effort to communicate and coordinate activities is formalized, these relationships are

generically referred to as "liaison relationships".

In such cases, a person is designated by the IAB to manage a given liaison relationship; that person is generally called the "IETF liaison manager" to the other organization. Often, the other organization will similarly designate their own liaison manager to the IETF.

This document is chiefly concerned with:

- * the establishment and maintenance of liaison relationships, and
- * the appointment and responsibilities of IETF liaison managers.

The management of other organizations' liaison managers to the IETF, whether or not in the context of a liaison relationship, is outside the scope of this document.

The IETF has chartered the Internet Architecture Board to manage the formal liaison relationships. Consistent with its charter [BCP39], the IAB acts as representative of the interests of the IETF in technical liaison relationships with other organizations concerned with standards, and other technical and organizational issues relevant to the worldwide Internet. Liaison relationships are kept informal whenever possible, and must possess demonstrable value to the IETF's technical mandate. Individual participants from the IETF community are appointed as liaison managers to other organizations by the IAB.

In general, a liaison relationship is most valuable when there are areas of technical development of mutual interest. For the most part, SDOs would rather leverage existing work done by other organizations than recreate it themselves (and would like the same done with respect to their own work). Establishing a liaison relationship can provide the framework for ongoing communications to

- * prevent inadvertent duplication of effort, without obstructing either organization from pursuing its own mandate;
- * provide authoritative information of one organization's dependencies on the other's work.

It is important to note that participation in the IETF work is open to everyone, and all the working documents and RFCs are freely available to everyone without the need for a formal liaison relationship. Hence, in almost all cases the need for a formal relationship is mostly driven by other organizations rather than by the IETF.

1.1. Changes compared to RFC4052

This version of the document contains the following updates:

1. Notes in the Introduction and Section 2.1 on "Liaison Relationships" that the IETF process itself does not require a formal liaison relationship, e.g. for document access or meeting participation, and therefore the need for a formal liaison relationship is often driven by processes of the peer organization.
2. Statement that the "IAB acts as representative of the interests of [...] the Internet Society" has been removed.
3. Role of the Liaison Representative (Section 2.3) has been removed since this role is not used in practice.
4. Clarification in section on "Liaison Communication" (now 2.3; was 2.4) that informal channels are preferred, with and without a formal liaison relationship, and further that liaison statements have no "special standing" in the IETF process.
5. Section on Summary of IETF Liaison Manager Responsibilities reworked.
6. Section 4 on "Approval and Transmission of Liaison Statements" has been moved to 4053bis.

2. Aspects of Liaisons and Liaison Management

2.1. Formal Liaison Relationships

A formal liaison relationship is established when it is mutually agreeable and required for some specific purposes, as viewed by the other organization, the IAB, and the IETF participants conducting the work.

The purpose includes two aspects:

- a) There is an overlap in work between one or more groups in each organization that requires close collaboration. This might include situation where one group in one organization has a dependency on a document produced in the other organization and requests in-depth support or would like to feedback new requirements. However note that the agreed need for close collaboration is a pre-condition for establishing a formal liaison relationship but does not automatically require the establishment of a formal liaison relationship as long as as there are no other formal or process barriers that are hindering

the collaboration. Generally informal collaboration is preferred and even formal communication in form of liaison statements, if needed, can be used without establishing a formal liaison relationship.

b) There are formal requirements or other process barriers that hinders informal collaboration. This might also includes the case where informal collaboration works well on group-level but the volume and tightly-coupled nature of interactions might make a more formal structure beneficial. However, this case could also be addressed with other kinds of IAB structures and might therefore not automatically require a formal liaison relationship with a liaison manager. Further note, that there are no processes in the IETF that require a formal liaison relationship. In otherwords, having a formal liaison relationship does not give the input or participation from the peer organization any different standing or weight than any other individual contribution. However, there might be formal requirements from the peer organization to enable collaboration within the peer organization's processes. Such potential formal requirements include the need for a formal liaison relationship:

- To get access to the peer organization's working documents or standards.
- To provide input to ongoing work at the peer organization.
- To participate in meetings of the peer organization.

There is no set process or form for this; the IETF participants and the peer organization approach the IAB, and after discussion come to an agreement to form the relationship. In some cases, the intended scope and guidelines for the collaboration are documented specifically (e.g., see [RFC3113], [RFC3131], and [RFC3356]).

In setting up the relationship, the IAB expects that there will be a mutual exchange of views and discussion of the best approach for undertaking new standardization work items. Any work items resulting for the IETF will be undertaken using the usual IETF procedures, defined in [BCP9]. The peer organization often has different organizational structure and procedures than the IETF, which will require some flexibility on the part of both organizations to accommodate. There is an expectation that both organizations will use the relationship carefully, allowing sufficient time for the requests they make on the other organization to be processed.

2.2. Liaison Manager

2.2.1. Speaking for the IETF

The mandate for IETF liaison managers is strictly limited to conveying IETF consensus to the liaised organization. The liaison manager must not send liaison statements on their own initiative to a liaised organization on behalf of IETF, or any of its areas and working groups. The liaison manager speaks on behalf of the IETF on the subject matter of the liaison, but only after making sure that the IETF consensus is understood.

2.2.2. Main Function of the Liaison manager

As described above, most work on mutually interesting topics will be carried out in the usual way within the IETF and the peer organization. Therefore, most communications will be informal in nature (for example, Working Group (WG) or mailing list discussions).

An important function of the liaison manager is to ensure that communication is maintained, productive, and timely. He or she may use any applicable businesslike approach, from private to public communications, and bring in other parties as needed. If a communication from a peer organization is addressed to an inappropriate party, such as being sent to the WG but not copying the Area Director (AD) or being sent to the wrong WG, the liaison manager will help redirect or otherwise augment the communication.

Since the IAB is ultimately responsible for liaison relationships, anyone who has a problem with a relationship (whether an IETF participant or a person from the peer organization) should first consult the IAB's designated liaison manager, and if that does not result in a satisfactory outcome, the IAB itself.

IETF liaison managers should also communicate and coordinate with other liaison managers where concerned technical activities overlap.

2.3. Liaison Communications

Communications between organizations use a variety of formal and informal channels irrespective of established liaison relationships. The stated preference of the IETF, which is largely an informal organization, is to use informal channels (e.g., discussion on expert level in specific Working group Meeting or mailing list), as these have integrated better into IETF process and historically worked well to expedite matters. In some cases, however, a more formal communication is appropriate, either as an adjunct to the informal channel or in its own place with or without liaison relationship. In the case of formal communications, the established procedures of many organizations use a form known as a "liaison statement". Procedures

for sending, managing, and responding to liaison statements are discussed in [RFC4053].

Note that communications between organizations have no difference to any other IETF contributions and should follow the same IETF process and policies and should be open to everyone for inputs and contributions, e.g., input discussion in specific working group in the IETF.

3. Summary of IETF Liaison Manager Responsibilities

The main responsibility of the liaison manager is to ensure good and formally correct communication between the organizations. This often includes:

- * Ensure received LSs are recorded and delivered to the relevant groups.
- * Ensure replies are sent in time or it is appropriately communicated why a reply is delayed or not sent.
- * Ensure liaison statements from the IETF adhere to the formal requirements of the peer organization (e.g. formatting) and are delivered to the appropriate groups.
- * Provide additional communication on e.g. process or known consensus positions in the IETF. This may also require participation in relevant meetings of the peer organization and potentially report back to the appropriate IETF organization any material information that is intended to be shared by the peer organization.

Formal messages from the IETF to the peer organization are usually carried in liaison statements. In certain situations, the liaison manager may carry additional messages, when specifically instructed. However, if these communications aim to "represent the IETF", they must have consensus, e.g. by being based on an RFC or some other formal statement by a group within the IETF.

Optionally liaison manager may provide updates to the IAB on technical matters. Especially if a concern e.g. regarding technical overlap or incorrectness is detected this should be communicated to the IAB. However, given most organization are quite large, it is not expected that the liaison manager can have the full overview about everything that is going on.

4. Security Considerations

The security of the Internet is not threatened by these procedures.

5. IANA Considerations

This document has no IANA actions.

6. References

6.1. Normative References

- [BCP39] Best Current Practice 39,
<<https://www.rfc-editor.org/info/bcp39>>.
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- [RFC3356] Fishman, G. and S. Bradner, "Internet Engineering Task Force and International Telecommunication Union - Telecommunications Standardization Sector Collaboration Guidelines", RFC 3356, DOI 10.17487/RFC3356, August 2002, <<https://www.rfc-editor.org/rfc/rfc3356>>.
- [RFC4052] Daigle, L., Ed. and IAB, "IAB Processes for Management of IETF Liaison Relationships", BCP 102, RFC 4052, DOI 10.17487/RFC4052, April 2005, <<https://www.rfc-editor.org/rfc/rfc4052>>.
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[RFC4052] was authored by Leslie Daigle and developed as part of a conversation regarding the management of [RFC4053], and the authors of [RFC4053] contributed significantly to it as well.

This version of the document is based on [RFC4052] and brings it in line with currently followed procedures. Further updates to all parts of the text are expected in the process of gathering community feedback for this document.

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