

DDI Alliance Executive Board Meeting

12 October 2020

Present: Bill Block, Cathy Fitch, Maggie Levenstein, Jared Lyle, Steve McEachern, Dana Mueller, Barry Radler, Joachim Wackerow, George Alter (guest)

SDTL

George Alter discussed the proposal from the new [Structured Data Transformation Language](#) working group about the DDI Alliance trademarking "Structured Data Transformation Language" and "SDTL." Prior to the meeting, George provided answers to the following three questions raised by the Executive Board during the September meeting.

Why do you want to trademark SDTL? The C2Metadata Project wants the DDI Alliance to maintain SDTL as an independent, open source standard. To do so, there needs to be a way to defend SDTL from others who might want to claim it. There have been cases where major tech companies appropriated standards created by others. For example, IBM could build SDTL into SPSS and then start changing the schemas without consulting the DDI Alliance. If SDTL is trademarked, the Alliance can prevent them from calling their product "SDTL."

Why does SDTL need protection? We believe that SDTL has value, and it may in the future be used in ways that we have not yet imagined. SDTL only has value as a standard if there is a single authority that decides what is and is not SDTL. We want the DDI Alliance to have that authority.

If the concern is about someone exploiting the name, would that be a bad thing (since it could drive use and implementation)? The problem is not exploiting the name. We want the name to be used. But we want the name to mean the same thing whenever it is used. The Alliance chose to use trademark for its standards as an alternative to using copyright. We don't want to place a restrictive copyright on DDI or SDTL, because we want them to be easy to use. But we don't want to allow anyone to make up their own version of SDTL and call it "SDTL". A trademark is easy to register and to defend.

George reviewed the history behind the DDI Alliance registering a collective mark. He indicated that the Alliance wanted to protect the standard against the possibility of someone powerful (e.g., IBM, Google) taking it over. Several options were available, including: ISO certification, copyright, and trademark. The Alliance decided to go with registering a trademark (collective mark), which means people can use the standard but they can't claim what they're doing is DDI unless the Alliance says they can. This means that if someone claims they're using DDI and wants to change some of the rules, the Alliance can refuse the changes if they run contrary to the Alliance's permission.

George indicated he thinks this is a good strategy for DDI, and that he thinks SDTL has the same characteristics. He noted there is the potential for commercial value for SDTL and he doesn't want other actors to try to hijack SDTL and change it without the Alliance's permission.

It was asked whether it is the brand or the individual work products of the Alliance that need trademarking. George said the brand needs trademarking and noted that SDTL is different than DDI-Codebook or DDI-Lifecycle since it will remain known as SDTL without DDI in the title. SDTL, he said, is a new brand.

George noted that SDTL is still in the very early days and it is not yet clear whether SDTL will take off like DDI has. As such, he said he does not think there is an urgent need to trademark it now. Still, he wants the Alliance to consider the issue and be prepared. George noted that the current biggest fans of SDTL are the DDI-CDI developers who have come up with a number of scenarios where SDTL can fill the gaps of what they need. There's also a discussion between DDI-CDI and a CODATA group for standards of measures (DRUM).

It was suggested that before SDTL is marketed and trademarked, we rename it to something catchier that gives it a better marketing edge. George indicated a preference to retain the current name since although it is not a great acronym, it is very descriptive. He noted SDTL is being marketed to application developers, who find the descriptive aspect of the name important.

It was noted that if SDTL is trademarked, the same would hold true for another DDI Alliance product, XKOS, which refers to SKOS and not DDI. SKOS itself does not seem to have a trademark but W3C has a trademark. In the text of SKOS, they refer to the trademark of W3C.

As a next step, it was proposed to continue exploring trademarking SDTL, especially since the Alliance does not want someone else to privatize the value. Jared will consult with the University of Michigan lawyers to explore the different protection options, costs to register protections, and the business case for the different options.

FY21 Executive Board meeting planning

The Board continued the discussion from the September meeting about discussion topics for upcoming meetings. Agenda topics include:

- Membership retainment and recruitment
- Strategic plan
- Revisit revenue models
- CODATA partnership
- Public release of DDI-CDI
- DDI-Lifecycle promotion

2021 Annual Meetings

The Board reviewed annual meeting options for 2021. In previous years, the Alliance has selected and promoted dates for the annual meetings well in advance. This year is different due to COVID-19.

It was noted that most professional meetings are now fully virtual, including the ICPSR Summer Program for next year, as well as the European DDI (EDDI) user conference at the end of this year. Deciding to move to an all virtual program can make it easier to plan a high quality event.

It was noted that the 2020 virtual DDI Alliance annual meeting was highly successful, with the most active participation in at least ten years. It was suggested to think about how to engage and take advantage of virtual conferences, including making the annual meetings completely virtual. It was noted that combining virtual and in-person meetings is difficult.

The value of in-person meetings was emphasized, including the suggestion to organize in-person meetings when the opportunities exist for member engagement and scientific discussion. The suggestion was made that if the Alliance moves to virtual meetings, it should commit to engaging at the relevant conferences (EDDI, NADDI, IASSIST) with dedicated sessions.

As a next step, Steve, Bill, and Jared will meet separately to discuss the 2021 annual meeting plans.

UNECE HLG-MOS Virtual Workshop Invitation

The DDI Alliance was invited to attend the Virtual Workshop of the High-Level Group on the Modernisation of Official Statistics (HLG-MOS) on 18-19 November 2020, which is being organized by the United Nations Economic Commission for Europe (UNECE). The HLG-MOS was created by the Bureau of the Conference of European Statisticians (CES) to provide a strategic vision and to actively steer international towards the modernisation of statistical organisations.

Achim Wackerow, Jay Greenfield and Dan Gillman have attended this meeting in the past. It was suggested to have Dan or Jay represent the DDI Alliance this year since they may already be planning to attend. Achim and Steve will meet separately to determine whom to ask to attend on behalf of the Alliance.