The Hermes Standard and IPC

Memorandum of Understanding

# History & Background

The Hermes Standard Initiative was founded March 22nd & 23rd, 2017 by 16 SMT equipment suppliers. It’s objectives are

* to provide a standard for seamless machine-to-machine communication using existing standards, and
* to ensure physical board transfer together with the board’s data.

The Hermes Standard Initiative has since grown to more than 60 members (as of November 2020).

In July 2018, IPC adopted The Hermes Standard as an IPC standard and named it IPC-HERMES-9852.

Since The Hermes Standard is now an IPC standard, further development of Hermes could be facilitated by moving the Initiative closer towards IPC work methods. By adopting more of IPC’s rules and procedures the effort for managing The Hermes Standard Initiative could be lowered and scope and traction in the market could be increased:

1. The limitation of The Hermes Standard Initiative to equipment suppliers only may narrow the view just to technical topics concerning machine-2-machine communication. However, using Hermes data may enable many more workflows that are not specified in The Hermes Standard, but are of great interest of manufacturers. Hence, bringing in members other than equipment suppliers could help securing best fit of scope for Hermes.
2. The Hermes Chair carries a lot of organizational workload to keep The Hermes Standard Initiative running. IPC could offload some of these management efforts and, thus, help the Hermes Chair to focus more on driving the innovation of The Hermes Standard.

**Memorandum of Understanding Between IPC and The Hermes Standard Initiative for Development and Maintenance of IPC-HERMES-9852**

This Memorandum of Understanding to develop and for ongoing maintenance of IPC-HERMES-9852 is entered into as of DAY, MONTH, YEAR between IPC and The Hermes Standard Initiative.

**Purpose**

IPC and The Hermes Standard Initiative wish to enter into an agreement for development and ongoing maintenance of a joint international standard, IPC-HERMES-9852. This standard represents a next-generation standard to the existing technology documented in IPC-SMEMA-9851. This agreement details the roles and process for the development and ongoing maintenance of this document as well as sales and distribution.

**Principles**

IPC and The Hermes Standard Initiative will develop a joint standard(s) with the following principles:

1. The Hermes Standard Initiative and IPC will utilize IPC Works for the project. This includes calls for comments, posting meeting agendas and minutes and scheduling meetings.
2. Each organization shall utilize IPC for staff liaison support.
3. Joint status is valid only for IPC-HERMES-9852.
4. As part of this agreement, IPC shall provide a meeting room annually during IPC APEX EXPO for The Hermes Initiative members. As needed, IPC can also provide a meeting room annually during IPC SummerCom.

**Development Process**

IPC and The Hermes Standard Initiative agree on the following development process:

* The development of IPC-HERMES-9852 shall comply with IPC’ s Standardization Procedures.
* IPC shall be the lead organization in the development of the joint standard. As lead organization, IPC will:
  + Form a group in IPC Works for the joint task group
  + Conduct all document review distributions through IPC Works
  + Compile all comments during each review
  + Ensure IPC’s Standardization Procedures are followed, including:
    - Managing the resolution of comments process to ensure consensus requirement are met
    - Ensuring maintenance of documentation (resolution of comments, meeting minutes, etc.) during the development process
    - Managing the ballot formation and balloting process
  + Manage the typesetting process for publication (layout, graphic design, translations, etc.)
* The draft standard development process shall be as follows:
  + A joint task group comprising Hermes Initiative members and other interested participants shall be formed to be responsible for the development of the joint standard in accordance with IPC’s Standardization Procedures.
  + If requested, an action team(s) (A-Teams) of the task group can be formed to develop the draft document for comment by the task group or the Final Draft for Industry Review. This A-Team(s) can also have other responsibilities, such as proposing resolutions of comments on draft standards for review.
* The working draft and/or Final Draft for Industry Review commenting process shall follow IPC’s Standardization Procedures:
* Any working drafts made available for comment shall be made available to the task group. The working draft commenting stage is optional.
* The Final Draft for Industry Review document shall be made available for comment to the task group and chairs of other IPC task groups, subcommittees and committees in accordance with IPC’s Standardization Procedures. In accordance with IPC’s Standardization Procedures, the Final Draft for Industry Review is also made available to the public through notification on the IPC Status of Standardization web page.
* The joint task group shall hold a meeting(s) to come to consensus resolution of all comments. All members of the task group and anyone outside of the task group who submits comments on the Final Draft for Industry Review shall be invited to participate in the meeting(s) to resolve comments in accordance with IPC’s Standardization Procedures.
* Once consensus resolution has been achieved for all comments, the joint standard will move to Proposed Standard for Ballot.
* The Proposed Standard for Ballot group formation and voting shall be as follows:
  + There shall be two ballot groups
    - The Hermes Standard Initiative ballot group shall consist of The Hermes Standard Initiative members.
    - The IPC ballot group shall consist of task group members and other interested parties who volunteer for the ballot group and shall meet the requirement for balanced interest categories (user, supplier, general interest) in accordance with IPC’s Standardization Procedures.
    - A voting site (company and physical address) shall only be allowed to participate on one ballot group.
    - IPC staff shall ensure both ballot groups meet these requirements.
  + The IPC ballot group shall use IPC Works for voting. The Hermes Standard Initiative members will vote during a Hermes Standard Initiative meeting.
  + The final voting of both ballot groups shall meet the consensus requirements of IPC’s Standardization Procedures for the IPC ballot group and the Hermes Initiative voting policies for the Hermes Initiative members.
  + The document shall be approved for publication by consensus of both ballot groups.
  + Any negative votes or comments from either ballot group shall be resolved in accordance with IPC’s Standardization Procedures.
  + The joint task group shall hold a meeting(s) to come to consensus resolution on any negative votes and comments.
  + Any necessary reballots shall meet the same consensus reballot voting requirements of The Hermes Initiative for Hermes Initiative member voting and IPC’s Standardization Procedures for the IPC ballot group.

**Continued Maintenance**

The joint task group shall maintain version updates of the standard following requirements of this MoU.

There shall be a published version update to the standard one to two times per calendar year.

**Publication Process**

IPC shall manage typesetting of the consensus standard for publication.

The joint task group leadership shall identify a volunteer group to serve as a review team for the final document for publication.

**Copyright and Digital Rights Management**

Draft proposals circulated for comment or vote shall display, at a minimum, IPC’s copyright statement. These documents shall also be protected using IPC’s FileOpen digital rights management (DRM) system. IPC will manage the implementation and troubleshooting of DRM on draft documents for comment and vote.

The published joint standard shall display IPC’s copyright statement.

**Logos**

The joint standard shall display the logos of both organizations on the cover page.

**Termination**

This Agreement may be terminated by either party, for any reason, by providing 120 days’ prior written notice to the other party. In the event of a termination of this Agreement, the obligations of each copyright holder, as they relate to the Joint Standard(s) in existence at the time of said termination, shall survive such termination. Each party will be offered a first right of refusal to accept a transfer of copyright ownership in the event of termination of this Agreement or in the event that the party/parties no long wish to retain and protect such ownership.

**Sale of Joint Standard**

IPC and The Hermes Standard Initiative mutually agree to provide this joint standard through their own sales and distribution channels.

1. IPC shall price the standard for sales in its bookstore.
2. The Hermes Standard Initiative shall make the standard available from its website.
3. IPC shall apply IPC’s FileOpen digital rights management (DRM) to the pdf version of the published standard for sale by IPC.
   * IPC can also apply DRM to the published document made available on The Hermes Standard Initiative website and provide DRM setup support for users.
4. Licensed distributors shall follow individual agreements with IPC for third-party sales.