

2008/3/19

To: Marc Ross, Akira Yamamoto, Nick Walker (GDE PMs)
From: Nobu Toge (GDE EMO)
Subject: On CAD Data Sharing Policies within GDE

Dear PMs,

I am writing to seek your guidance concerning the policy issues associated with engineering data sharing within GDE, particularly, the CAD data at EDMS.

As we all recognize, it is imperative for us to establish effective sharing of engineering design data in the form of CAD drawings for successful execution of TDP activities at GDE. The EDMS is the platform to be deployed for that purpose. Now that the implementation of EDMS is being readied for general use by TAGs and their members, it is a good time to examine potential issues related to trade secrets in CAD data and to prepare adequate guidelines that are agreeable by all who are involved.

Here is an assorted list of issues, or items to note:

1. CAD drawings are nearly always automatically associated with copyrights by their originators, and some of the drawings also include trade secret information that their originators seek certain non-disclosure treatment.
2. CAD drawings will be prepared by the laboratory staff, as well as by the contractors. In some cases, some of the laboratories can provide GDE with such drawings only via partially (or entirely) contracted work done at the industries.
3. Maximum sharing of drawings with maximum details is, of course, the preferred premise in terms of rapid technical development at GDE. However, because of the issues above this simple preference cannot be met all the time in simplistic ways.
4. Implementation of protection of trade secrets is achievable at various levels of our interaction with EDMS which in practice may be combined, namely,
 - Protection can be achieved by not releasing the information at EDMS. This can be done by simply not releasing the drawings at all, as well as by releasing only the non-trade-secret portions of the drawings.
 - Protection can be achieved by explicitly imposing access restrictions to relevant portions of EDMS.
 - Protection is achieved via NDA rather than mechanical access policies within EDMS.
5. The concept of "plug compatibility" that is under active discussion in the area of SRF, and elsewhere, might be exploited for separating the issues of sharing of "common boundary conditions" type drawings, which are likely to be less prone to trade secret issues, and "component level details" type drawings, which are likely to be more prone to such issues.

I think that development of adequate guidelines for CAD data sharing will have to be done through a multi-pronged exercise under coordination of PMs.

- We need to understand and quantify the level of sharing, as sought by various parties inside and outside GDE, who are involved, directly or indirectly.
- We need to understand the level of protection, as sought by various parties inside and outside GDE, who are involved, directly or indirectly.
- We need to develop adequate guidelines, share these guidelines with all the parties involved, and develop a system that monitors that these guidelines are actually respected and met.

Needless to say, the EMO is at your (PMs) disposal in developing solutions for this issue.

END