

# Xalgorithms Alliance Stakeholder Roles and Working Assumptions About their Revenues and Costs

Joseph Potvin <[jpotvin@xalgorithms.org](mailto:jpotvin@xalgorithms.org)>  
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## 1. Xalgorithms Foundation

### Roles:

- Maintain the DWDS specification (licensed CC-by 4.0)
- Maintain three software reference implementations of RuleMaker and RuleTaker software (licensed Apache 2.0; and of RuleReserve (licensed AGPL).
- Maintain technical documentation for each reference implementation (licensed CC-by 4.0)
- Provide organizational support for the Xalgorithms Alliance
- Provide quarterly briefings and annual reports.

### Revenue Basis (Design):

A market-based not-for-profit organization resourced through grants and contributions in 5 categories:

- **Strategic Implementers** make a CAD\$100,000 annual contribution, and they also arrange for an equivalent in-kind commitment to joint research and development. **Market Rationale:** Generate revenues or cost savings for themselves based on the free and open-source DWDS system.
- **Experimenting Implementers** make a CAD\$10,000 annual contribution, and they also arrange for an equivalent in-kind commitment to joint research and development. **Market Rationale:** Experiment with generating revenues or cost savings for themselves based on the free and open-source DWDS system.
- **Developers & Researchers** make a CAD\$500 annual contribution towards member services that directly or indirectly assist the participatory nature of Xalgorithms Alliance research and development. **Market Rationale:** Each learns from others by participating in Xalgorithms community R&D.
- **R&D Donors** provide grants and contributions, in cash and/or in-kind to support joint research and development, either to Xalgorithms Foundation or to any of the active Working Groups. **Market Rationale:** Advance DWDS for its improvements to the market as a whole, or to a use case sector, which the donor would benefit from, or just prefers.
- **Board Members** and **External Advisors** provide in-kind consultative assistance towards the development and deployment of an Internet of Rules. **Market Rationale:** Advance DWDS for its improvements to the market as a whole, or to a use case in their industry sector, which the donor would benefit from, or just prefers.

### Costs of Operation (Design):

- Staffing and operational overhead.
- Documentation costs.
- Event costs.

## 2. DWDS 'Distro' Providers

### Roles:

- Manage independent reviews of DWDS reference implementations:
  - risks of potential patent, copyright and industrial design infringement;
  - assurance and failure response methodology and performance regarding system integrity (prevention/detection of tampering), privacy, confidentiality, auditability, reliability (preventing 'bugs' in code, design and architecture), trustworthiness, and authorization controls.
  - reference implementation performance speed and efficiency;
  - system simplicity and elegance.
- Produce branded DWDS reference implementations (their own 'distros');
- Maintain errors & omissions insurance.

### Revenue Basis (Assumption):

- Subscription fees for their branded DWDS reference implementations ('distros');
- Optionally, a service package.

### Costs of Operation (Assumption):

- Staffing and operational overhead.
- Errors & omissions insurance;
- Xalgorithms Alliance fees enable ongoing maintenance of the DWDS specification and reference implementations.
- Potentially, Working Group fees to advance a use-case domain of DWDS implementation

### **3. Independent Reviewers**

#### Roles:

- Perform arms-length reviews of DWDS reference implementations for:
  - potential patent, copyright and industrial design infringement;
  - security risks;
  - performance speed and efficiency;
  - system simplicity and elegance.
- Report findings to Assurance firms, allow time for their comment, and publish report+comment.

#### Revenue Basis (Assumption):

- Fees for analytical and reporting services

#### Costs of Operation (Assumption):

- Staffing and operational overhead.

#### **4. Systems Integration Firms**

Roles:

- Plan, arrange and market corporate subscriptions for the firm's own differentiated value-added packages of products and services (including training) extended from a branded DWDS distro.

Revenue Basis (Assumption):

- Subscription fees for packages of products and services (including training)
- Ad hoc consulting fees (e.g. for customization; integration; tailored support).

Costs of Operation (Assumption):

- Staffing and operational overhead;
- Contractors;
- Xalgorithms Alliance fees enable ongoing maintenance of the DWDS specification and reference implementations.
- Potentially, Working Group fees to advance a use-case domain of DWDS implementation

## 5. Contractors

### Roles:

- Provide specialized services to:
  - Xalgorithms Foundation;
  - Assurance firms;
  - Systems integration firms;

### Revenue Basis (Assumption):

- Fee-for-service;

### Costs of Operation (Assumption):

- Staffing and operational overhead.
- Xalgorithms Alliance fees enable ongoing maintenance of the DWDS specification and reference implementations.
- Potentially, Working Group fees to advance a use-case domain of DWDS implementation

## 6. Commercial Training Provider

### Roles:

- Develop, market and deliver:
  - training ‘packages’;
  - train-the-trainer ‘packages’;
  - proficiency certifications.
- Prepare and sell learning aids:
  - Written;
  - Presentation;
  - Podcast;
  - Video;
- Registry of training services and trainers;
- Scheduling of training services;
- Monitor feedback and outcomes.

### Revenue Basis (Assumption):

- Fees for courses and workshops.
- Fees for training aids.
- Certification exam fees.

### Costs:

- Staffing and operational overhead;
- Subscription fees to the Assurance Firm;
- Production of training curricula and materials;
- Training infrastructure (physical; virtual);
- Marketing and business development relating to its DWDS-based products and services;
- Xalgorithms Alliance fees enable ongoing maintenance of the DWDS specification and reference implementations.
- Potentially, Working Group fees to advance a use-case domain of DWDS implementation

## **7. End User Entities (Client Organizations):**

### Roles:

- Implement DWDS solutions in operations;
- Provide useful feedback.

### Revenue Basis (Assumption):

- Improved capability, efficiency and rules conformance.

### Costs:

- Subscription fees to branded DWDS 'distros';
- Implementation expenses;
- Staff training;
- Staff operations;
- Xalgorithms Alliance fees enable ongoing maintenance of the DWDS specification and reference implementations.
- Potentially, Working Group fees to advance a use-case domain of DWDS implementation

## 8. Hosted Working Group

### Roles:

- Convene stakeholders to guide:
  - DWDS general purpose utility;
  - DWDS quality, security, simplicity
  - Cooperation optimization (incl. ROI)
  - Issues management;
  - Stakeholder balance.

### Revenue Basis (Assumption):

- Each Working Group determines its own membership fee structure.

### Costs of Operation (Assumption):

- Staffing and operational overhead;
  - Online & in-person stakeholder meetings;
  - Donations to Xalgorithms Foundation
- (All WGs jointly donate an annually-negotiated common % of revenue).

The annual amount contributed to Xalgorithms Foundation by Xalgorithms Hosted Working Groups is negotiated annually, taking into consideration the value provided by the DWDS system (specification and reference implementations), the ongoing development and maintenance costs, and the anticipated net income that the participating commercial entities can leverage from DWDS.

## 9. Free/Open Voluntary Contributors

### Roles:

- Contribute quality work to DWDS specification and reference implementation development;
- (Volunteers may also receive financial income via other stakeholder roles.)

### Revenue Basis (Assumption):

- In-kind benefits <https://xalgorithms.org/organization#value>
- Reputation and goodwill that improves financial earning potential via other stakeholder roles;
- Gain knowhow that improves one's earning potential generally.

### Costs:

- Time and effort

## **Dispute Resolution**

Any dispute involving two or more Members shall be resolved by negotiations.

If there is a dispute between or amongst Members, a resolution will be proposed to the affected parties by a facilitating Member who is elected by a 3/5ths majority (60%) vote open to all Members who choose to vote. They must be given at least 4 calendar days notice before the vote, and a vote-casting period of at least 1 full calendar day. This process does not impinge on the rights or responsibilities of any Member to pursue legal action.

The elected facilitating Member will suggest that his/her intervention should be considered binding or only advisory (as a basis for further negotiations).

Each Member agrees to refrain from initiating legal action against another Member in relation to Xalgorithms Alliance operations without first obtaining a formal written endorsement of the general merits of the planned legal action from the Xalgorithms Alliance Board of Representatives as follows. The Board of Representatives's endorsement of legal action against a Member shall be based upon a vote with at least 7 calendar days prior notice, providing a vote-casting period of at least 3 calendar days, that is open to all current Members, which results in at least 3/5ths majority (60%) of the votes cast endorsing the action. The direct parties to the dispute must recused themselves from this vote.

If a Member initiates legal action against one or more other Members in relation to Xalgorithms Alliance Operations without first obtaining this written endorsement, then the plaintiff's own Xalgorithms Alliance Accession Agreement is immediately and automatically revoked (except for non-disclosure provisions), on the grounds that the spirit and the terms of related documents have thereby been violated.