

# VIRTUAL WORLDS GUIDELINES FOR IBM EMPLOYEES

## Introduction

IBM believes that virtual worlds and other 3D Internet environments offer significant opportunity to our company, our clients and the world at large, as they evolve, grow in use and popularity, and become more integrated into many aspects of business and society. As an innovation-based company, IBM encourages employees to explore responsibly and to further the development of such new spaces of relationship-building, learning and collaboration. As we engage in these new environments, IBMers should follow and be guided first and foremost by our values and our Business Conduct Guidelines.

These Virtual Worlds Guidelines for IBM employees have been created to build upon those foundations and to address the some of the choices that individual IBMers may face in virtual worlds. These guidelines are not intended to address every situation you may encounter through use of a digital persona or personas. But reflecting as they do the input and expertise of a global team of experts--IBM's Virtual Universe Community\* --the guidelines are a good start at informing our collective engagement and exploration.

## Virtual World Guidelines: Summary

1. **Engage.** IBM encourages its employees to explore responsibly – indeed, to further the development of – new spaces of relationship-building, learning and collaboration.
2. **Use your good judgment.** As in physical communities, good and bad will be found in virtual worlds. You will need to exercise good judgment as to how to react in these situations – including whether to opt out or proceed.
3. **Protect your – and IBM's – good name.** At this point in time, assume that activities in virtual worlds and/or the 3D Internet are public – much as is participation in public chat rooms or blogs. Be mindful that your actions may be visible for a long time. If you conduct business for IBM in a virtual world or if you are or may appear to be speaking for or on behalf of IBM, make sure you are explicitly authorized to do so by your management.
4. **Protect others' privacy.** It is inappropriate to disclose or use IBM's or our clients' confidential or proprietary information – or any personal information of any other person or company (including their real name) – within a virtual world.
5. **Make the right impression.** Your avatar's appearance should be reasonable and fitting for the activities in which you engage (especially if conducting IBM business). If you are engaged in a virtual world primarily for IBM business purposes, we strongly encourage you to identify your avatar as affiliated with IBM. If you are engaged primarily for personal uses, consider using a different avatar.
6. **Protect IBM's and others' intellectual property.** IBM has a long-established policy of respecting the intellectual property of others, and of protecting its own intellectual property. Just as we take care in our physical-world activities to avoid infringement of intellectual property rights and to provide proper attribution of such rights, so we

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\* IBM's Virtual Universe Community is a growing internal organization to which IBMers exploring virtual worlds can contribute as we refine these guidelines and deal with new challenges as they emerge. See: [IBM forums : virtual-universe-community](#)

- must in our activities in virtual worlds – in particular with regard to the creation of rich content.
7. **IBM business should be conducted in virtual environments only with authorization.** You should not make commitments or engage in activities on behalf of IBM unless you are explicitly authorized to do so and have management approval and delegations. If you are authorized, you may be asked by IBM management to conduct IBM business through a separate avatar or persona reserved for business use. You should certainly decide to use a separate avatar or persona if you think your use of an existing one might compromise your ability to represent IBM appropriately.
  8. **Be truthful and consistent.** Building a reputation of trust within a virtual world represents a commitment to be truthful and accountable with fellow digital citizens. You may be violating such trust by dramatically altering your digital persona's behavior or abandoning your digital persona to another operator who changes its behavior. If you are the original creator or launcher of a digital persona, you have a higher level of responsibility for its behavior.
  9. **Dealing with inappropriate behavior.** IBM strives to create a workplace that is free from discrimination or harassment, and the company takes steps to remedy any problems. However, IBM cannot control and is not responsible for the activity inside virtual worlds. If you are in a virtual environment in conjunction with your work at IBM and you encounter behavior that would not be acceptable inside IBM, you should “walk away” or even sign out of the virtual world. You should report abuse to the service provider. And as always, if you encounter an inappropriate situation in a virtual world which you believe to be work-related, you should bring this to the attention of IBM, either through your manager or through an IBM internal appeal channel.
  10. **Be a good 3D Netizen.** IBMers should be thoughtful, collaborative and innovative in their participation in virtual world communities – including in deliberations over behavioral/social norms and rules of thumb.
  11. **Live our values and follow IBM’s Business Conduct Guidelines.** As a general rule, your private life is your own. You must, however, be sensitive to avoid activities in a virtual world that reflect negatively on IBM. Therefore, you must follow and be guided by IBM’s values and Business Conduct Guidelines in virtual worlds just as in the physical world, including by complying with the Agreement Regarding Confidentiality and Intellectual Property that you signed when you became an IBM employee. It is obviously most important to do so whenever you identify yourself as an IBMer and engage in any discussions or activities that relate to IBM or its business, or use any of IBM’s communications systems or other assets to participate in a virtual world.

### **Virtual Worlds Guidelines: Discussion**

Virtual worlds – such as Second Life, Active Worlds, There, Entropia Universe, Forterra and others – are services that allow people to interact through digital personas or avatars. Many third-party companies now provide these services to individuals and organizations, sometimes free of charge. Most require participants to agree to the company’s terms of service. These terms are typically aimed at protecting the virtual world service provider’s control over all aspects of the service and the content and data generated in that virtual world.

Thus, your ability to remain a member of a virtual world or to have or use a space within that world likely is not guaranteed.

Every virtual world has its own unique characteristics and terms of service. In signing up to participate in a virtual world service, you should fully understand the terms and conditions to which you are agreeing as a member of that community. You should also recognize that, unless otherwise specifically directed by IBM management, you are signing those terms and conditions as an individual. You are responsible for all aspects of your participation in a virtual world; IBM is not.

It is also important to remember that virtual worlds are public, software-based, open societies in which having a dialogue is similar to having a discussion or meeting in a public place, such as a hotel lobby or an airport. You should operate on the assumption that all actions, communications and data can be seen, heard and recorded by anyone, including the service provider – which may not, and often does not, have any obligation to protect your communications or information. Be mindful that all of your actions will be public and may be visible for a long time.

### **Launching Digital Personas and Disclosing Their Identities**

How much of your own personal information you decide to share is up to you. Many virtual world services will give you choices about how you choose to identify your digital persona. In some instances, members may use their real names, while other virtual worlds may require members to choose from names created by the service provider – or a combination of both. Additionally, you may have the opportunity to give your digital persona a profile that may be viewed by other members who are interested in learning more about your interests, hobbies, profession, etc.

When you engage in a virtual world, you are subject to the same requirements and obligations as in the physical world, including following and be guided by IBM's values and the Business Conduct Guidelines. Additionally, you may not conduct business or represent IBM unless you have been explicitly authorized by IBM management. Management may require or you may decide it is necessary to have a separate avatar to conduct IBM business.

Many virtual worlds allow participants to be anonymous. In most such cases, you are not required to reveal your true identity – and you do not know the true identity of others you meet. So, for example, simply because the name “IBM” or another company brand or logo appears in a digital persona's profiles, on clothing or even on a heads-up display, that does not necessarily guarantee that an individual truly is affiliated with IBM or other such entity.

The identity of a digital persona's creator(s), or his or her online activities and related information, is personal information and should only be disclosed by that digital persona or where possible or practical with the prior explicit permission of the owner of that digital persona. Even if you happen to know a digital persona's real name, it is best not to address that persona by that name when communicating in virtual worlds, unless the persona's owner has given you permission to do so. IBM clients, IBM employees, IBM Business Partners and suppliers should likewise not be cited or referenced without their prior approval.

## **Appearance**

Virtual worlds give you the ability to create the way in which you want to represent your digital persona visually. This can be anything from a reasonable likeness of the actual person to a fictional creature.

Avatar customization, clothing and all aspects of appearance and behavior are among the forms of innovation in virtual worlds. In general, your digital persona's appearance is up to you. When you are using your avatar or persona in association with IBM, however, your judgment in these matters should be shaped by the same general guidelines that apply to IBMers in physical environments – i.e., that your appearance be appropriate to the context of your activities. You need to be especially sensitive to the appropriateness of your avatar or persona's appearance when you are meeting with IBM clients or conducting IBM business.

## **Digital Persona Ownership & Responsibility**

Over time, a digital persona you create or in which you share ownership may have the opportunity to build and maintain a reputation in its original virtual world, or elsewhere – perhaps for a skill, talent or influence over a certain industry, community or audience. Building a reputation of trust within a virtual world represents a commitment to be truthful and accountable with fellow digital citizens. Dramatically altering, splitting or abandoning your digital persona may be a violation of that trust. It may also violate the terms of use of a virtual world. And in the case of a digital persona used for IBM business purposes, it may violate your obligations to IBM.

Similarly, the originator of a digital persona may deliberately decide to allow his or her avatar to have several "owners" or operators if permitted by the terms of the virtual world. In these situations, the owners are collectively accountable to exhibit consistent behavior through the digital persona and to maintain the level of trust and transparency it previously exhibited with its fellow digital personas, before its ownership or participation was expanded. Also in these situations, it may become necessary for the persona's originator to establish ground rules for the persona's new co-owners – along with decision-making methods or procedures, in the event of disagreement among them. Early examples of such systems of shared responsibility and collective forms of decision-making are to be found in communities such as Linux, Wikipedia or the Creative Commons.

In any event, a digital persona with shared ownership or control should not be used for IBM business purposes without explicit IBM management approval.

## **Identities that Span Multiple Environments**

IBM expects that, just as we saw with the 2D, text-based Web, today's discrete virtual worlds will evolve toward a globally interlinked 3D Web. IBM and other companies are already developing technology to enable "trusted roaming" and "portable identities" that can move seamlessly among different virtual environments. Further, we are seeing new forms of interconnection between virtual spaces and with the physical world. As this happens, it will open up the possibility of boundary-spanning identities. We can think of this as the opposite of the multiple-identity capacity we have discussed previously. Instead of one physical

person spawning many digital identities within a given virtual world, in this case one identity can exist simultaneously in more than one digital world.

And just as we have developed informal systems of etiquette for current forms of multi-tasking – e.g., that guide whether it is acceptable to keep a laptop open and/or to instant-message with someone during a given meeting – we will need to evolve cultural norms about what kinds of “outside” actions are permissible when one is “in world”. These and many situations far more complex will call on IBMers to be both thoughtful and innovative, as we follow and are guided by our values and the Business Conduct Guidelines.

### **Protecting IBM Intellectual Property Assets**

Your responsibility to IBM concerning intellectual property, as outlined in the agreement you signed at the time of your hire, applies as much in the virtual world context as in the physical world context.

Virtual worlds residing outside the IBM firewall should be viewed as public spaces, because they are provided and physically controlled by third parties who generally offer no guarantee to protect the confidentiality or privacy of information, or even to retain information reliably. Individuals employed by virtual world providers (e.g., “administrators”) have broad powers to monitor and control action within the world with very few, if any, checks on their powers. They are not necessarily obligated to treat user information with any particular level of care.

In addition, while some worlds include capabilities to restrict access in certain ways, creating an appearance of privacy, the efficacy of such features is generally not known and not guaranteed. Thus, it is inappropriate to disclose or use IBM’s or our clients’ confidential or proprietary information – or any personal information of any IBM employee or other person or company – within a virtual world.

You should only use IBM content in a virtual world with explicit permission from IBM management. Make sure you are following IBM development guidelines before posting IBM intellectual property in virtual worlds, including providing proper attribution\* to IBM and obtaining any intellectual property protections available (e.g., patents, copyrights and trademarks) before seeking permission to use IBM intellectual property in a virtual world. When in doubt, consult your IBM intellectual property attorney.

### **Respecting Intellectual Property of Others**

IBM has a long-established policy of respecting the intellectual property of others. Just as we take care in our physical-world activities to avoid infringement of anyone’s intellectual property rights, so we must in our activities in virtual worlds. Likewise, even when using third party intellectual property with permission, you need to ensure that you are providing proper attribution of any intellectual property contained in the content.

We must pay particular attention to the creation of rich content. It is a major attraction of virtual worlds, and a valued asset. The creation of such content is an important aspect of

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\* See: [Marketing | Managing the brand | Logos | IBM logo](#)

IBM's participation in virtual worlds. However, creation of such content must be done with care to avoid copying or using the content of others unless permission is first granted by the owner.

You are responsible for ensuring that your virtual world activities and creations do not infringe the intellectual property rights of others. When in doubt, consult your IBM intellectual property attorney.

### **Doing Business in a Virtual World**

Transactions that take place in virtual worlds can be subject to the same laws and regulations as physical-world transactions. IBM's policy is to comply with all laws and regulations that apply to its business. It is your responsibility to ensure that you do not do anything that causes IBM to be non-compliant.

IBM has already been asked to participate in a broad spectrum of business opportunities in virtual worlds – everything from currency exchange to content creation. Some of the new types of opportunities presented may have business or legal implications. When considering business opportunities in virtual worlds, it is helpful to start with the notion that if IBM does not participate in a business or activity in the physical world, we would probably not engage in such a business or activity in a virtual world (at least, not without careful consideration and explicit approval by IBM management).

As a general rule, you should not assume that you are authorized to conduct business for IBM in a virtual world of any type or in any manner unless you are explicitly authorized to do so by IBM management and established procedures. Once you are authorized to do business and as in the physical world, any items created, bought or sold for or on behalf of IBM in a virtual world remain IBM's property.

Also, once you are authorized to do IBM business in a virtual world you need to consider whether you have any concerns about the ability of your existing/personal avatar or persona to conduct that business and to represent IBM appropriately. If so, you should conduct IBM business through a separate avatar designated exclusively for business use. You may also be required by IBM management to do IBM business through a separate avatar or persona. In both cases, there may be additional guidelines provided to you for your business-use avatar.

### **Export**

Just as in the real world, if content or data or information is export-controlled by the government of the United States or any other country, it cannot be shared in a virtual world comprised of people from all over the physical world. You need to ensure that data and information are not export-controlled before posting or using anywhere in a virtual world. If you have any questions about the export classification of data or information, please contact your IBM attorney or export control office.

### **Encountering Inappropriate Behavior**

As in the physical workplace, IBM expects that you will follow and be guided by the IBM Business Conduct Guidelines, including avoiding discrimination against, harassment of and other inappropriate actions towards others in virtual worlds. Remember at all times that there are real people behind every digital persona and avatar. You should not do anything that is or may be considered offensive to others.

IBM strives to create a workplace that is free from discrimination or harassment and takes steps to remedy any such problems. External virtual worlds, however, are outside of IBM's control. If you are in a virtual environment in conjunction with your work at IBM and you encounter behavior there that would not be acceptable inside IBM, the recommended approach is to ignore such behavior and to “walk away” or even sign out of the virtual world. If these approaches do not prove sufficient and/or if the behavior persists, you should report the abuse to the service provider.

As always, if you encounter an inappropriate situation in a virtual world which you believe to be work-related, you should bring this to the attention of IBM, either through your manager or through an IBM internal appeal channel.

### **On Your Own Time**

IBM respects the legal rights of our employees in all countries in which we operate. As mentioned above, what you do in your own time is generally your own affair. However, you do need to consider whether your digital persona could be linked to IBM in activities in which you participate on your own time. Any conduct that adversely affects your performance as an IBM employee, that of other employees or IBM's legitimate business interests may result in disciplinary measures, including dismissal.

### **Summary**

IBMers are encouraged to engage, to learn and to share their learning and thinking with their colleagues. That is what it means to be part of an innovation company. As we do so, our best guideline is to approach virtual worlds in the same way we do the physical world – by using sound judgment and following and being guided by IBM's values and the Business Conduct Guidelines. Remember that IBM's integrity and reputation, as well as your own, are in your hands. If you are unsure of the correct action or behavior at any stage, speak to your manager, your HR partner or an IBM attorney.

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