

USNC 10th TAG Leadership Workshop

FM Approvals Monday,
12 September 2022
9:00 AM - 5:00 PM ET



10th USNC TAG Leadership Workshop

Thank you for joining us for today's TAG Leadership Workshop! The virtual component of this workshop will begin shortly, around 9:30 a.m. ET.

For virtual participants, please note that we will be using the **Chat** feature during today's sessions. If you wish to ask a questions, please send it to us via Chat. USNC staff will monitor and moderate these questions.

Welcome

Bill Lawrence, FM Approvals



United States
National Committee
of the IEC



Keynote Address

Phil Piqueira, Chair of ANSI Board of Directors



United States
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Kahoot! and Bingo Activities



United States
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Nuts & Bolts of TAG Leadership Panel and Discussion



United States
National Committee
of the IEC



Nuts & Bolts of TAG Leadership

Panelists:

- Florence Otieno (TIA)
- Josephine Mahnken (FM Approvals)
- Valara Davis (UL Standards & Engagement)

Moderator:

- Grace Roh (UL Standards & Engagement)

Nuts & Bolts of TAG Leadership Panel and Discussion

Virtual participants are encouraged to submit their questions using the chat feature during this panel discussion. The chat will be monitored by USNC staff.

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Kahoot!



United States
National Committee
of the IEC



USNC TAG Model Operating Procedures

Bill Lawrence, FM Approvals



United States
National Committee
of the IEC



TMC – Technical Management Committee

SCOOP – Subcommittee on Operating Procedures

- This subcommittee, under the supervision of TMC is
 - Responsible for the “Model Operating Procedures”
 - Responsible for qualifying “Unique Operating Procedures”
- Addresses all USNC Technical Advisory Groups (USNC TAGs)

Model Operating Procedures (MOP) Unique Operating Procedures (UOP)

- This presentation is based on the 2019-06 MOP
- All USNC TAGs have reaffirmed operation in accordance with the revised MOP or provided a copy of their UOP subsequently approved by SCOOP and TMC
 - A few new TAGs are still working through the MOP / UOP adoption process
- Any UOP must address all of the requirements outlined in the MOP

USNC TAG

- A USNC TAG is required for each IEC TC/SC/SyC on which the US participates as a “P” member
- The USNC TAG is essentially a “mirror” committee to the IEC TC/SC/SyC

USNC TAG Responsibilities

- Nominate TA and DTA (if desired)
- Develop / Support US New Work Item Proposals (NP)
- Establish US consensus positions for IEC documents
- Identify delegates to TC/SC Meetings
- Develop US positions for items at TC/SC Meetings
- Appoint experts to WG / MT / PT / AG
- Coordinate with TMC on IEC officer positions
- Liaise with other USNC TAGs as necessary

USNC TAG Officers

- Technical Advisor (TA)

- Single point of technical contact for the USNC TAG, Typically serves as Chair

- Deputy Technical Advisor (DTA)

- Serves as deputy to the TA and other functions as agreed by the USNC TAG

- USNC TAG Administrator

- Organization assigned by TMC to provide administrative support

- USNC TAG Secretary

- Individual appointed by the USNC TAG Administrator to provide day-to-day administrative support

USNC TAG Technical Advisor (TA)

- Nominated and approved by USNC TAG
- Appointed by TMC for 4-year term
- Typically serves as Chair
- Qualifications
 - Technical expertise in the subject area
 - Recognition by industry sector
 - Good negotiating skills
 - Financial support for activities
 - Knowledge of the IEC process

USNC TAG Deputy Technical Advisor (DTA)

- Also nominated and approved by USNC TAG
- Appointed by TMC for 4-year term (concurrent with TA)
- Acts as deputy to Chair
- Qualifications (Same as TA)
 - Technical expertise in the subject area
 - Recognition by industry sector
 - Good negotiating skills
 - Financial support for activities
 - Knowledge of the IEC process

USNC TAG Responsibilities of TA

- Guide selection of delegates to TC/SC Meetings
- Guide US positions for items at TC/SC Meetings
- Arrange for distribution of IEC documents to USNC TAG members for collection of comments and proposed votes
- Identify and initiate USNC TAG votes to appoint US experts to WG / MT / PT / AG
- Coordinate with TMC as deemed necessary
- Ensure compliance with USNC Operating Procedures

USNC TAG Administrator / Secretary Responsibilities

- Provide administrative support for operation of USNC TAG
 - Circulation of IEC documents
 - Maintain roster in conjunction with USNC Office
 - Circulation of USNC TAG meeting agendas and minutes
 - Coordinate with TA on transmission of USNC TAG positions to the USNC Office for submission to IEC
- Ensure compliance with Operating Procedures
 - Model Operating Procedures (MOP)
 - Unique Operating Procedures (UOP)

USNC TAG Members

- Open to “US National Interested Parties”
 - Representing a company domiciled in the US
 - Representing federal, state, or local government
 - US Citizen or permanent resident
- Assessed a USNC annual participation fee (currently \$310)
 - USNC TAG Administrator may charge an additional fee
 - Process for waiver of fees is available
 - Resource Experts, Consumer Advocates, Life Members (no fee)
 - USNC Premier Members (no fee)
- Application and voting for membership candidates

USNC TAG Membership application

- Formal application
- CV highlighting candidate's qualifications
- Identification of “Interest Category”
 - Producer
 - User
 - Testing / Certification
 - Regulatory / Inspection
 - Special Expert
- Representing an organization?

USNC TAG Membership application

USNC TAG MEMBER APPLICATION

Name: _____

Title: _____

Organization: _____

Address: _____

Telephone: _____

Email: _____

USNC TAG(s): _____

Interest Category:

☐ **Producer** – Individuals who are involved in the production, manufacture, or distribution of the type of product or system under the scope of the USNC TAG. This includes individuals involved in the design, engineering support, manufacturing, testing, and/or marketing of the type of product or system; or who are employed by or represent a producer, manufacturer, or distribution of the type of product or system.

☐ **User** – Individuals who are involved in using the type of product or system that is the topic of the USNC TAG, but who are not involved with the production, manufacture or distribution of that type of product or system.

☐ **Testing / Certification** – Individuals who represent organizations that provide testing, assessment and/or certification of the type of product or system that is the topic of the USNC TAG.

☐ **Regulatory / Inspection** – Individuals who represent governmental entities having regulatory or inspection interest in or influence over the type of product or system that is the topic of the USNC TAG.

☐ **Special Expert** – Individuals who have expertise in an aspect of the type of product or system that are not covered by another interest group.

Signed: _____

Date: _____

Attach Curriculum Vitae for circulation with USNC TAG membership ballot.

USNC TAG Membership approval

- The CV highlighting candidate's qualifications is circulated to the USNC TAG members for an approval ballot
- Applicant becomes a voting member of the USNC TAG upon:
 - Affirmative vote by the USNC TAG
 - Payment of any USNC TAG Participation Fee
 - Payment of any USNC TAG Administrator Fee
 - Addition to the official USNC TAG Roster

USNC TAG US-Appointed Experts

- Requires an affirmative vote of the USNC TAG
- CV highlighting USNC TAG member's qualifications
 - Significant experience in the subject
 - Involved in national standardization
 - Strong communication skills
 - Able to travel and participate in meetings
 - Multiple experts from same company discouraged
 - Balance desirable
- Confirmation of Employer Support

USNC TAG Form for US-Appointed Experts



Please return to the USNC office at usnc@ansi.org

FORM FOR THE APPOINTMENT OF USNC/IEC EXPERTS

(Please use one form for each appointment)

TC/SC	Enter TC/SC
WG, PT, MT – and Title	Enter WG, PT, MT and Title
Name of US Expert	Enter Mr./Ms./Mrs. and Full Name
Title	Enter Title of US Expert
Company Name	Enter Company Name
Company Address	Enter Complete Mailing Address
Representation Type	Enter Organization, Company, or Government Agency
Interest Category	Enter Producer, User, Testing/Certification, Regulatory/Inspection, or Special Expert
Office Number	Enter Phone Number
Mobile Number	Enter Phone Number
Email Address	Enter Email Address

Please Confirm One of the Following:

- ☐ The Appointee has been notified that he/she will be invoiced the USNC TAG Participation Fee
- ☐ The USNC TAG Participation Fee is not applicable; [Please explain](#)

Please Confirm All of the Following:

- ☐ The applicant has submitted Curriculum Vitae (CV) highlighting experience in the specific technical area.
- ☐ The applicant has submitted a letter from the applicant's employer confirming support for the participation.
- ☐ The USNC TAG Secretary has circulated a ballot to the USNC TAG with a copy of the CV.
- ☐ USNC TAG members have voted in support of the US Expert appointment.

Proposed by:
[Enter your name](#)

Date:
[Click or tap to enter today's date](#)

USNC TAG Voting

- USNC TAG determines quorum for voting
 - Typically
 - Minimum number of members in good standard; or
 - % of members in good standing
- USNC TAG Agreed quorum submitted to USNC office

USNC TAG IEC Document Voting (CDV / FDIS / DTS / TS)

- Requires a vote of the USNC TAG
 - Affirmative – Comments optional
 - Negative – Comments (technical) required
 - Abstain – Comments optional
 - Inability to achieve consensus
 - Decision to neither support or oppose
 - No position submitted to USNC Office on time
 - No quorum for voting
 - No position – Comments optional
- Also “Default Voting Procedure”

USNC TAG Procedural Matters Voting

- Requires a vote of the USNC TAG
 - Affirmative – Comments optional
 - Negative – Comments (technical) required
 - No position – Comments optional
- Also “Default Voting Procedure”

USNC TAG Votes

- Majority vote of the USNC TAG
 - Approval of officers
 - Approval of experts
 - Formation of a sub-group
 - Disbandment of a sub-group

USNC TAG Votes

- 2/3 vote of the USNC TAG
 - Adoption of Operating Procedures
 - Change of USNC TAG Scope
 - Appointment of USNC TAG Administrator
 - US Position of IEC documents
 - Termination of USNC TAG

Right to Appeal a USNC TAG Action

- Written complaint filed with Secretary
- Response by Secretary within 30 days
- Appellant can request a hearing
- Appeals panel appointed by TA
- Decision within 30 days
- Further appeals
 - TMC
 - Council
 - ANSI Appeals Board

USNC TAG

Appeal of USNC TAG Admin Fees

- Written Appeal filed with USNC Office
- Appeal addressed by TMC
 - TMC Ad Hoc appointed
 - Decision provided to TMC for ratification
- Further appeal to Council
 - Council Ad Hoc appointed
 - Decision provided to Council for ratification
- Decision within 30 days
- Further appeal to ANSI Appeals Board permitted

USNC TAG

Default Voting Procedure

- TA or Secretary advises that a member's vote is assumed to be affirmative unless a member replies in the negative with supporting technical comment(s)
- If no negative votes submitted, the affirmative vote is submitted to the USNC Office
- If negative vote(s) are received, the TA will work with the USNC TAG member(s) to develop an appropriate US response to the ballot
- If consensus cannot be achieved, an abstention is submitted.

USNC Toolbox

<https://www.ansi.org/usnc-iec/programs-activities/toolbox>

- Model Operating Procedures for USNC IEC Technical Advisory Groups (USNC/TAGs)
- Annex E: USNC TAG Member Application
- Interpretation of USNC TAG MOPs: Section 7.4 New Members
- USNC Expert Appointment Form
- USNC TAG Administrator Application
- USNC Policy in Distribution of Free Copies of IEC Standards and Working Documents for Use in USNC Standards Development Activities
- Why the USNC Charges Fees

Contact Information

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ISO/IEC Directives

Tony Zertuche, USNC



United States
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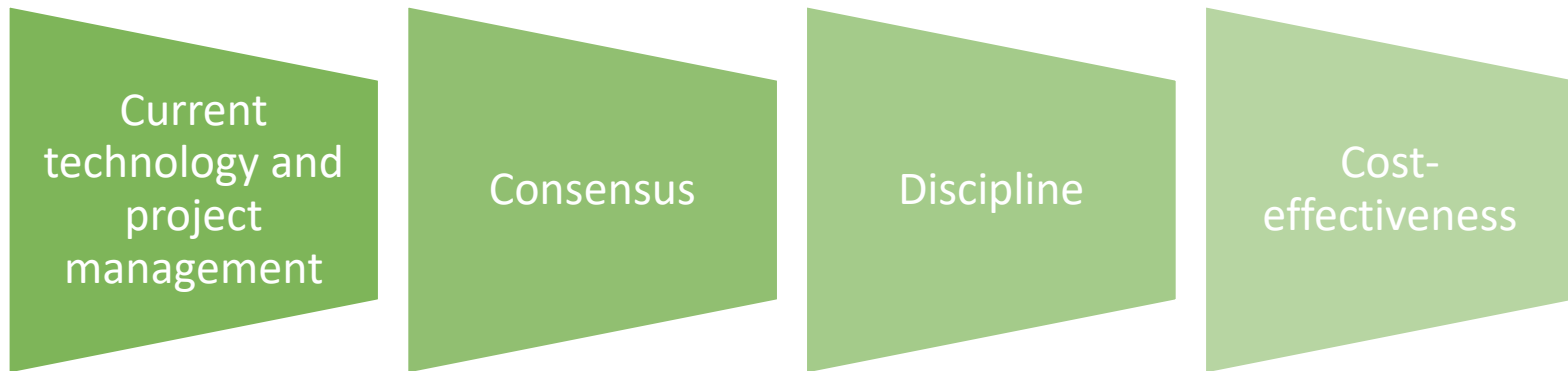
Guiding Principles

- International standards should meet societal and market needs and should not be developed to act as barriers to trade
- ISO and IEC follow globally accepted principles of standards development:
 - Consensus
 - Transparency
 - Openness
 - Impartiality
 - Effectiveness and relevance
 - Performance-Based
 - Coherence
 - Due Process
 - Technical Assistance
 - Flexible

ISO/IEC Directives: Part 1

Procedures for the Technical Work

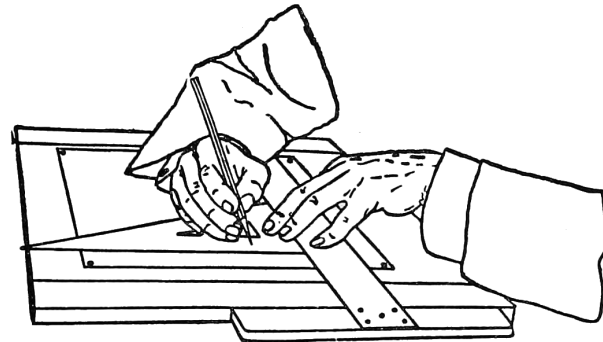
- Sets out the procedures to be followed within ISO and IEC in developing, approving and maintaining International Standards, and for the administration of TCs and subsidiary bodies
- The procedures are based on the following concepts:



ISO/IEC Directives: Part 2

Principles and rules for the structure and drafting of ISO and IEC documents

- Sets out the specific rules for the structure and drafting of documents so that International Standards, Technical Reports or Guides are drafted in as uniform a manner as possible, irrespective of technical content



IEC Supplement: *Procedures for the Technical Work – Procedures Specific to IEC*

- Complements the ISO/IEC Directives
- Contains those procedures which are specific to IEC
- Includes useful Annexes, as well as the IEC Forms



Key Policies and Standards Development Alternatives

- Global Relevance Policy and Procedures
- Fast-track processing
- Normative references
- “In Some Countries” Clauses
- Fragments
- Double-logo Standards



Global Relevance Policy and Procedures



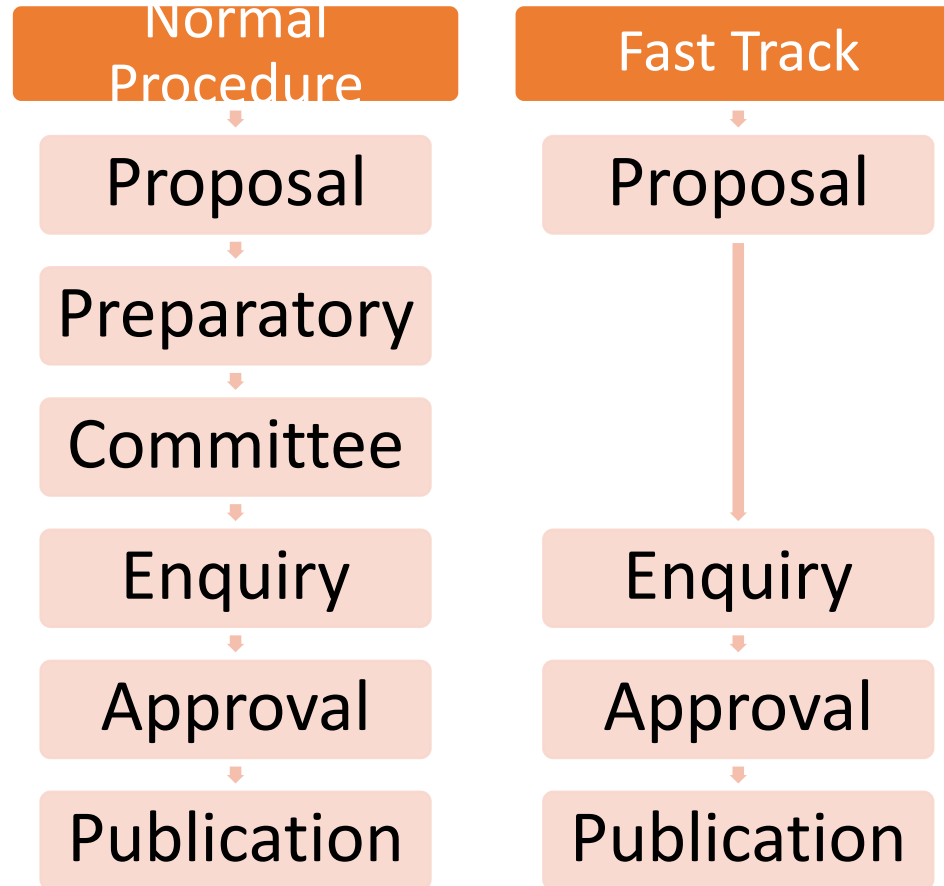
- A formal IEC policy to provide for the implementation of essential differences in requirements in IEC standards
 - Normative requirements included in the main body or in a normative annex
 - Essential differences based on:
 - national (or regional) differences in technical infrastructures (frequencies, voltages, etc.)
 - climatic conditions
 - Submitted by National Committees to the relevant TCs/SCs/SyCs with technical and market justification

Fast Track Processing

- Purpose is to rapidly progress an existing standard from any source
- Proposed by
 - Any P-Member or Category A liaison organization
 - process begins at Enquiry Stage (CDV ballot)
 - Any organization having entered into a formal technical agreement with IEC may propose
 - process begins at Enquiry Stage (CDV ballot)
 - International Standardization Body recognized by IEC
 - process begins at Approval Stage (FDIS ballot)



Fast Track Processing



*It is highly recommended that committees consider the fast track process when developing standards.

All Standards Development Options

Project Stage	Normal Procedure	Draft Submitted with Proposal	"Fast-track Procedure"	Technical Specification	Technical Report	Publicly Available Specification
Proposal Stage	Acceptance of proposal	Acceptance of proposal	Acceptance of proposal	Acceptance of proposal		Acceptance of proposal
Preparatory Stage	Preparation of working draft	<i>Study by working group</i>		Preparation of draft		Preparation of draft
Committee Stage	Development and acceptance of committee draft	<i>Development and acceptance of committee draft</i>		Acceptance of draft	Acceptance of draft	Acceptance of draft
Enquiry Stage	Development and acceptance of enquiry draft	Development and acceptance of enquiry draft	Acceptance of enquiry draft			
Approval Stage	<i>Approval of FDIS</i>	<i>Approval of FDIS</i>	<i>Approval of FDIS</i>			
Publication Stage	Publication of International Standard	Publication of International Standard	Publication of International Standard	Publication of Technical Specification	Publication of Technical Report	Publication of PAS

Stages in italics, enclosed by dotted circles may be omitted

References in IEC Standards

■ Normative References

- A list of related standards that are required for full implementation of the standard in hand
- The normative referenced document list shall be introduced by the following wording:

“The following referenced documents are indispensable for the application of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.”

■ Informative References

- For information only or background reading and listed in the Bibliography



“In Some Countries” Clause

- Informative (not normative) text concerning particular conditions existing in certain countries (exceptions)
 - Any statement of compliance with a standard requires compliance with the *normative* elements of that standard, not the *informative* elements
- Statement is provided by an IEC National Committee to be included in an IS, informing the user of the standard of particular conditions existing in its country
 - Two cases are distinguished
 - i. Conditions of a permanent nature, such as main voltages, mains frequencies or climates
 - ii. Differing practices of a less permanent nature



“In Some Countries” Clause (cont)



- Final point for submission of the text is on receipt of the voting report of the CDV
 - Submission does not require approval of the relevant TC, SC or SyC, its chair or secretary
 - Submitting National Committee has the final say as to where to place the clause
 - Every effort shall be made to find solutions that would make statements regarding particular conditions unnecessary
 - Inclusion of the clause is *not* a reason for a negative vote by the other National Committees

Fragments

- Fragments is the term used when during the development of a project it is **split into two or more parallel developments which are later merged** before the final approval of the project.
- Whilst this is briefly defined in the IEC supplement of the ISO /IEC Directives Part 1: Subclause 2.9.3.2 Maintenance procedure and is supported by the IEC IT system it is **not widely used**.
- See [SMB/7513/R](#) for further information on fragments.

Latest Update – IEC DMT

Summary of the main changes

- **Abstention is fully considered as a National Committee vote**
- Working Group meetings: documents on the CP and introduction of hybrid meetings
- Joint working groups operations: improved balance between the committees
- Membership of advisory and ad-hoc groups: clarification of Members roles
- Liaison between ISO and IEC Committees: Liaison representatives can attend WG meetings
- Committee Stage, clarification of the process
- Decisions at enquiry stage: Clarification of the options to move forward, second CDV now possible in case of approved CDV
- Conversion of a CDV into a TS or PAS: directly to DTS or DPAS
- TS PAS and TR: Major review of the text to include the purpose of each publication and add a second optional DTS DPAS, DTR ballot for technical changes
- ⁵¹Consistency of terminology: Use of the term "document" throughout Directives in replacement of "publication" or "deliverable"

Participation in the work of Committees

To clarify the P-Member's participation and voting statistics calculation in Clause 1.7.4

Formal participation to plenary meetings can be in person, virtually or by correspondence;

Voting "abstain" is considered as a vote and is counted when calculating the P-Members participation statistics

1.7.4 A committee secretariat shall notify the office of the CEO if a P-member of that committee:

1) has been persistently inactive by failing to attend ~~physically, by correspondence or remotely~~ two successive committee meetings (in person, virtually or by correspondence) and failing to have any expert(s) appointed to the technical work, or

2a) In IEC:

has failed to vote on questions formally submitted for voting within the Committee (see 1.7.1).

Note: abstentions are taken into account when evaluating P-Member participation

2b) In ISO:

has failed to vote on over 20 % (and at least 2) of the questions formally submitted for voting on the committee internal balloting (CIB) within the Committee over one calendar year (see 1.7.1).

[...]52

Reference Materials & Source Documents

- [ISO/IEC Directives, Part 1: 2021](#)
Procedures for the technical work
- [ISO/IEC Directives, Part 2: 2021](#)
Rules for the structure and drafting of International Standards
- [ISO/IEC Directives, Part 1:2021 + IEC Supplement:2021](#)
Procedures specific to IEC
- [IEC Statutes and Rules of Procedures](#)
IEC membership and participation procedures
- [USNC Statutes: 2018](#)
- [USNC Rules of Procedure: 2005](#)
- [Model Operating Procedures for USNC/IEC TAGS: 2019](#)
- [Guide for U.S. Delegates to meetings of ISO and the IEC](#)

Contact Information

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Lunch Break

We will resume at 1:00 p.m. ET

Up Next: New Copyright Procedures



United States
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Kahoot!



United States
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of the IEC



IEC's Copyright Policy & Procedures USNC Leadership Meeting

Gail A. Matthews
ANSI Associate General Counsel

September 12, 2022



Copyright 101 - Refresher

- A copyright is a bundle of intangible rights to
 - make copies, license, sell or otherwise exploit
 - works created in a fixed and tangible form of expression
- Copyrightable Forms of Expression:
 - written works (in any medium)
 - photographs
 - paintings
 - other forms of expression created in a fixed tangible medium
- International Standards (and component parts) are copyrightable
- Copyright is a valuable form of intellectual property
- Copyright in an IEC Standard is an asset to the IEC



IEC's "New" Copyright Policy (2020)

- "Copyright in IEC publications, including International Standards, and other materials is an important asset for the IEC."
- "The IEC will respect copyright of third parties, and where necessary license such third-party copyright for use in publications and other materials produced by the IEC."
- "Subject to" its acknowledgment of the copyright rights of third parties and intention to license such rights for inclusion in IEC publications, "the policy of the IEC is to own copyright in all publications and other materials produced by the IEC."
- "The IEC will license use of copyright in IEC publications in accordance with the Object of the IEC as set out in the Statutes and Rules of Procedure of the IEC."
- Implementing Guidelines, including guidelines on the ownership and licensing of IEC copyright," were published with the new policy.



How has the IEC Defined Third-Party Copyright v. IEC-Owned Copyright?

IEC's new policy defines copyrightable contributions and the rights it acquires to these contributions in two ways:

- Pre-Existing Copyright
- Collaborative Copyright



Pre-Existing Copyright Work

- Pre-Existing Copyright –
“is a work enjoying copyright created and in existence outside the collaborative work of the IEC, and contributed to the IEC for incorporation into an IEC International Standard or other publication.”
- This is the copyright that exists in material already created and written down, including for example:
 - Material authored before (or outside of) the collaborative standards-development exchange (i.e., a chart pulled out of someone’s briefcase and contributed during a development meeting)
 - A fully developed standard created by an SDO somewhere in the world
- Previously, IEC’s right to this type of copyright was handled on a case-by-case basis



Collaborative Copyright Work

Collaborative Copyright –

“is a work enjoying copyright created as part of an IEC International Standard or other IEC publication by an expert in collaboration with other experts in the development of such standard or publication.”

- This is copyright that is collaboratively developed in the IEC Standards-development process
 - the copyright in things written down and contributed by experts
 - authored during the collaborative exchange at TC/SC meetings
- Previously, IEC (like ISO) simply claimed "copyright" in the final product without documentation
(as per section 2.13 of the Directives)



On-Line Expert Notice & Click Box

Online Click-Box in IEC IT Tools by which an Expert agrees to:

- Grant a non-exclusive license in “Pre-Existing Copyright Work” that such Expert contributes to the standard, and
- Notify IEC of third-party “Pre-Existing Copyright Work” offered for inclusion in the standard, and
- Transfer ownership in the “Collaborative Copyright Work” that is created by such expert in collaboration with other experts in the development of the standard, and
- Declare (where applicable) that such expert is authorized by employer to agree to these conditions, and
- Commit to respect the IEC’s copyright



Employer Notice via Email to Address “Work for Hire” Doctrine

- Experts who are employed are asked to provide the name and email address of their supervisor
 - The Expert is asked to obtain the supervisor’s permission to give the IEC the supervisor’s name and email address
 - The Expert confirms that the Supervisor has given permission for the IEC to email the Supervisor
- IEC then seeks to affirm with the supervisor the employer’s agreement to the conditions in the Expert Notice
 - The Employer Notice is sent via email from IEC to Expert’s Supervisor
 - IEC has no expectation of a response from Supervisor
 - IEC will follow up if email transmission fails



Exceptions to the IEC Policy

- There could be a situation where an Expert or Employer is unable to agree to the IEC's new licensing/transfer provisions:
 - National law of an IEC member makes compliance impossible (e.g., German law provides that copyright ownership always remains with creator)
 - A pre-existing arrangement between a National Committee and its experts makes compliance impossible (e.g., Standards Australia requires all experts to assign copyright ownership to SA, so experts from Australia have no ownership rights to convey)
 - Special circumstances exist in the view of the relevant NC and IEC that warrant an exception
- The Implementation Guidelines allow for these exceptions
- The Exceptions are not mentioned in the Expert and Employer Notices
- If the Expert or Employer is unable to agree to the licensing/transfer provisions, the USNC (along with the expert/employer copyright contributor) and the IEC will attempt to draft an alternative arrangement that is fair and appropriate



Feedback?

Is it working and workable?



Does the IEC's Copyright Policy apply to code components and software supplements in IEC Standards/Deliverables?



AHG 92

Investigating the Impact of copyright and licensing on future IEC standardization

IEC established AHG 92 to investigate the consequences of advanced technologies and a changing environment on:

- IEC's Copyright Policy, and
- IEC's ability to distribute and license deliverables with code components and digital artifacts



Challenges that ahG 92 is Addressing

- Define the various technologies
 - Code components might be defined as text within or related to an IEC deliverable that has to be copied or modified from the deliverable to be processed by a computer
 - Software supplements could be defined as supplementary information not required for the implementation of the respective IEC deliverable



Challenges that AHG 92 is Addressing (cont'd)

- Identify the changing environment, including:
 - Machine readable standards
 - Digital artifacts
 - Open source code and related licensing restrictions
 - Source form of code components (binary formats v. legible source forms such as XML, JSON, C, C++, Python, Java, etc.)
 - Other SDO and consortia activities



Challenges that AHG 92 is Addressing (cont'd)

Biggest Challenges:

- Determine whether code that is available through open source licenses can be utilized in IEC deliverables
- Determine how the IEC EULA for Code Components could possibly allow for modification and development of derivative works as required by various open source licenses (e.g., Apache 2.0)



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Global Relevance

Sonya Bird
Director, International Standards
September 11, 2022

Safety Science in Action™

IEC Global Relevance Policy (AC/17/2008)

- A formal IEC policy to provide for the implementation of essential differences in requirements in IEC standards
- To fulfil the IEC mission TC/SC members need to be aware that they are developing "state of the art" standards, which must have the widest possible acceptance on the global market.
- To allow products complying with IEC standards to meet the different needs of major segments of the global market, essential differences in requirements may, in well specified cases, be included on an equivalent basis, as either normative requirements or in an informative annex.
 - Normative requirements included in the main body or in a normative annex
 - Essential differences based on:
 - national (or regional) differences in technical infrastructures (frequencies, voltages, etc.)
 - climatic conditions
 - Legal and regulatory requirements
 - Submitted by National Committees to the relevant TCs/SCs with technical and market justification

What is “In Some Countries”?

- Informative (not normative) text concerning particular conditions existing in certain countries (exceptions)
 - Any statement of compliance with a standard requires compliance with the *normative* elements of that standard, not the *informative* elements
- Statement is provided by an IEC National Committee to be included in an IS, informing the user of the standard of particular conditions existing in its country
- Every effort shall be made to find solutions that would make statements regarding particular conditions unnecessary
 - Inclusion of the clause is not a reason for a negative vote by the other National Committees and the inclusion of a statement(s) in the Forward or body of the standard does not automatically obligate the National Committee sponsoring the statement(s) to vote affirmatively on the draft document.

Grouping “In Some Countries”

- It is the submitting National Committee that has final say as to where to place the “in some countries” clause.
- Placing the clause in the Annex may reduce its visibility to those who wish to market in the US. Of course, in a national adoption of the standard, the US version could incorporate those into the body, rather than an annex.
- Placing the clause in the body of the standard may be disruptive to the flow of the document

Submitting “In Some Countries”

- A statement by a National Committee shall be given prior to the circulation of a final Draft International Standard (FDIS) for voting, preferably at a meeting of the relevant technical committee or subcommittee, or, at least, after consultation with its Chair and secretary.
- The final point at which a National Committee can request the inclusion of an “in some countries” clause is on receipt of the voting report of the CDV. Before the FDIS text is sent to Central Office, the officers will need to address the statement and, either concur with it, or enter into discussions with the National Committee submitting the statement, referring the matter, if necessary, to the Standardization Management Board.

IEC Global Relevance Toolbox (AC/22/2007)

- The IEC has developed a Global Relevance Toolbox that provides a variety of tools to permit TCs/SCs to accommodate various needs to ensure that their publications can be used worldwide. The Toolbox presents examples of different cases which can occur when attempting to develop a globally relevant standard and indicates how each of these cases can be integrated.
- It should be noted that these are broad guidelines only and are by no means necessarily exhaustive. Other solutions agreed by the committee may also provide a satisfactory response.



IEC SMB ahG 93

Use of the Global
Relevance Toolbox
(GRT) in technical
procedures

Final Report

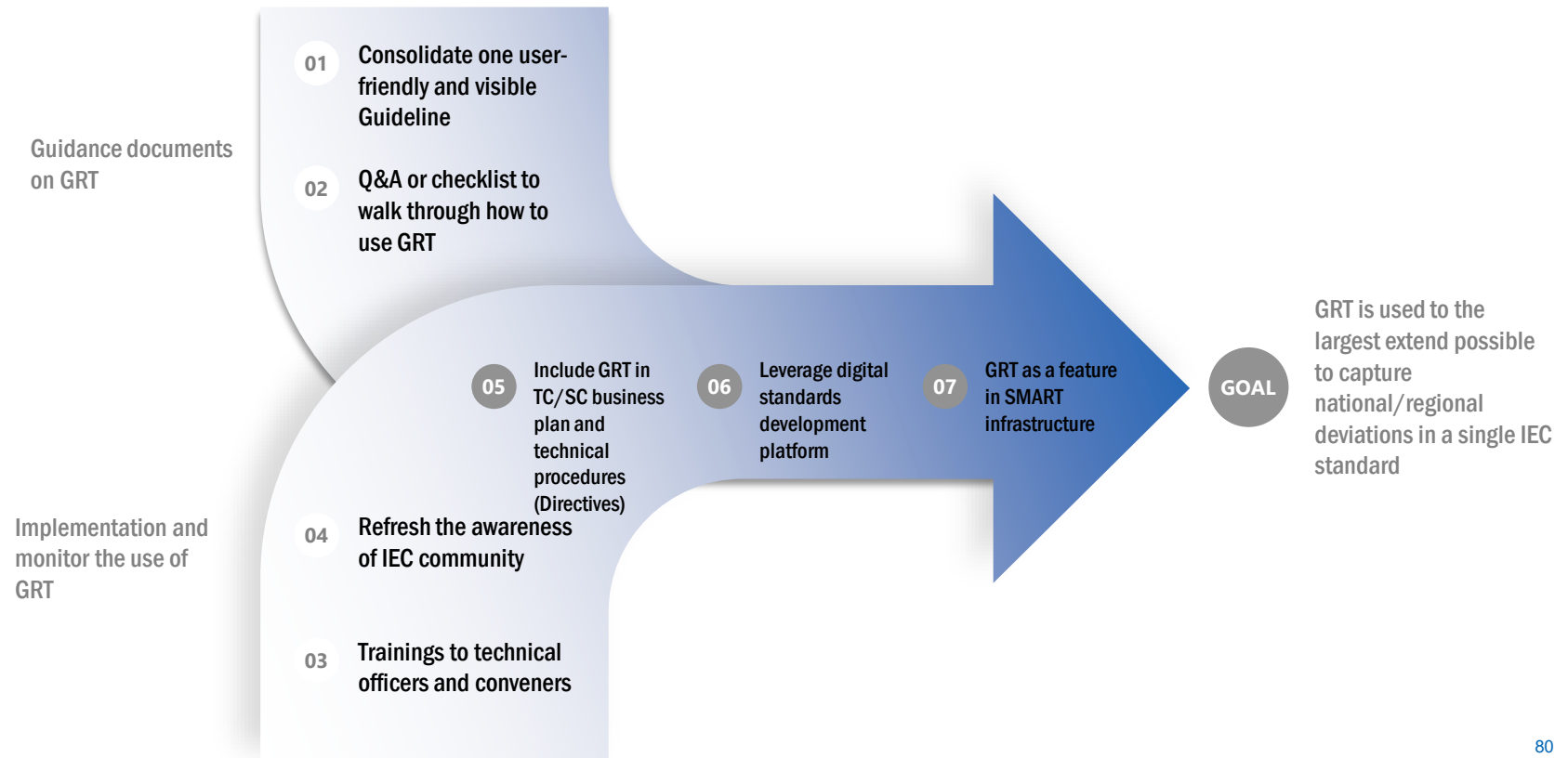
ahG 93
Report to the SMB
SMB meeting 175

31 October 2022



International
Electrotechnical
Commission

Background: Work done by Council Board MPI NC WG3



SMB ahG 93 Scope

SMB Decision 172/13

Global Relevance Toolbox (GRT)

Michael Teigeler presented the work of the Masterplan Implementation (MPI) NC WG 3 on the use of the Global Relevance Toolbox (GRT) in technical procedures.

SMB noted that all recommendations from the WG had been approved and agreed on the importance of the topic for the IEC technical work.

In order to support the implementation of the recommendations, SMB set up ahG 93, *Use of Global Relevance Toolbox in technical procedures*, with the following scope:

- Develop a guidance document on the GRT as outlined in the report of MPI NC WG 3.
- Support Central Office in implementing the GRT in technical processes (e.g. through standards development platform).
- Engage with ISO to align approaches on the issue of global relevance.
- Propose recommendations for potential inclusions in the Directives.

SMB requested ahG 93 to provide its final report at SMB meeting 175 in October 2022.

Based on ahG 93 Scope – 3 Task Cluster teams:

- **Task cluster 1 – Develop a guidance document on GRT**
 - Consolidate all information of GRT into one user-friendly and visible Guidance document – including IEC Academy & Communications
- **Task cluster 2 – Implementing the GRT in technical processes**
 - The objective is that the content of a standard is identically maintained as much as possible – one (1) common international standard – while only criteria-based deviations are timely taken into consideration in the technical procedures for standards development.
- **Task cluster 3 – Digital tools/platform/website**
 - To recommend and improve the usability of GRT by harnessing IEC digital technologies – including updates to TC Tools on IEC website

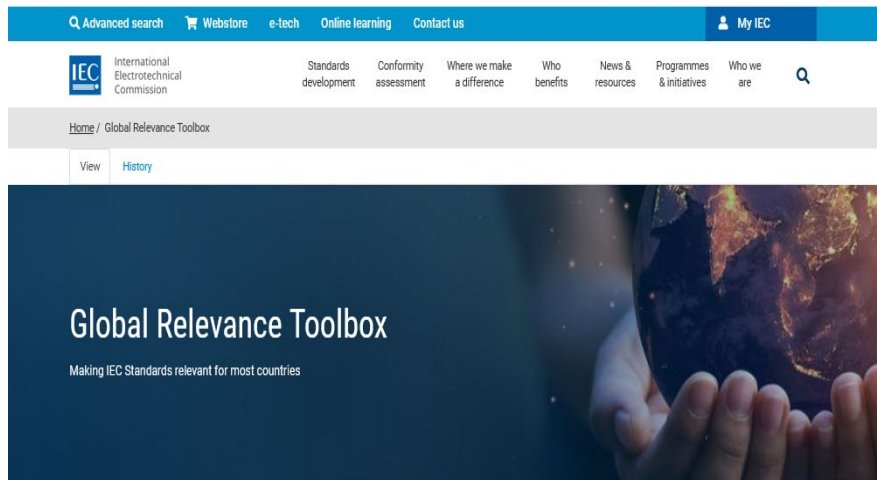
ahG 93 Recommendations

- A.1 Endorse the Global Relevance Toolbox (GRT) web page and its content (www.iec.ch/grt)
- A.2 Recommend that the link to the IEC GRT web page be in a **visible and prominent location** on the IEC home page, **and** replicated in the *TC/SC Resource area* under the Standards Development tab.
- A.3 Recommend approving the modified IEC Forms for NWIP, CD, CD for TS, CDV, FDIS and RR to reflect “concerns for local regulations or technical differences” as referenced in B.4, Cluster Team 2 of this report **and** request IEC Secretariat to update these forms accordingly.

ahG 93 Recommendations

- A.4 Recommend that a new GRT training programme be established by the IEC Secretariat and administered by the IEC Academy.
- A.5 Recommend sharing this report and its outcome with the ISO TMB. It is further recommended that the IEC DMT work with the ISO/IEC JDMT to amend ISO/IEC Directives Part 1, Annex C, clause C.4.13.3, to include references and instructions for the application of the Global Relevance Toolbox.
- A.6 Recommend that the IEC Board consider setting up a project on IEC Adoptions data to increase transparency and to demonstrate the global relevance of IEC standards.
- A.7 Recommend that the SMB disband ahG 93.

A.1 and A.2 : GRT web page



www.iec.ch/grt

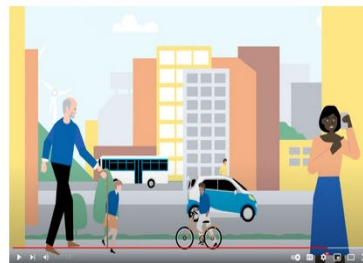
Why international standards need to be relevant for most countries

The IEC has adopted the WTO (World Trade Organization) Technical Barriers to Trade Agreement (TBT). WTO can consider standards that fail to meet such requirements as creating a barrier to free trade.

This obliges the IEC to ensure that IEC International Standards represent a unique state-of-the-art international solution that is globally relevant to allow countries to more easily trade and source goods around the world.

International standards, if they are (nearly) everywhere the same, provide convenience and reassurance that the same level of safety, interoperability, reliability, etc. has been considered. Together with conformity assessment this provides peace of mind.

Video animation to explain why global relevance is important to be added



A.3 : IEC Forms - modifications

To reflect the “concerns for local regulations or technical differences” ahG 93 recommends that the IEC Forms for NWIP, CD, CD for TS, CDV, FDIS and RR are modified to recognize / identify any relevant “In some countries” clauses to be included in the draft standards.



Form NP with
ISC.docx



Form CD with
ISC.docx



Form CDV with
ISC.docx



Form CD TRTS with
ISC.docx



FDIS with ICS.docx



Form RR with
ISC.docx

A.4 : Create GRT Training Program



Supporting National Committees,
IEC Regional Centres and other IEC
Departments to build knowledge,
skills and enthusiasm within the IEC
community and beyond

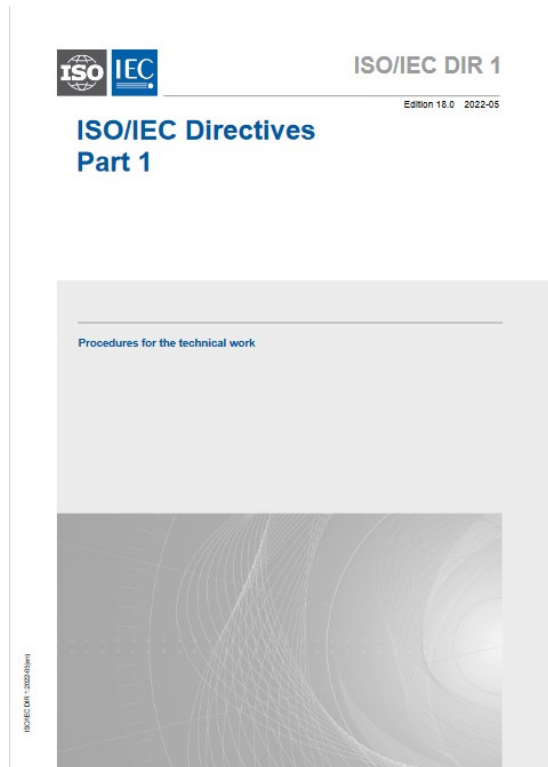


Support for National Committees

Offering NCs support with capacity building and
training activities

[Read more →](#)

A.5 : Update ISO/IEC Directives



Part 1 Annex C, Clause C4.13.3

The screenshot displays a PDF viewer interface. On the left is a table of contents with the following items: CONTENTS, FOREWORD, 1 Organizational structure and responsibilities for the technical work, 2 Development of International Standards, 3 Development of other documents, 4 Meetings, 5 Appeals, ISO/IEC ANNEXES, Annex A (normative) Guides, Annex B (normative) ISO/IEC procedures for liaison and work allocation, Annex C (normative) Justification of proposals for the establishment of standards, and Annex D (normative) Resources of secretariats and qualifications of. The main content area on the right shows the text of Clause C4.13.3. It begins with a paragraph: 'document(s), for example, whether the document is intended as requirements to support conformity assessment or only as guidance or recommended best practices; whether the document is a management system standard; whether the document is intended for use or reference in technical regulation; whether the document is intended to be used to support legal cases in relation to international treaties and agreements.' This is followed by a bulleted list. The first bullet point is: '- A simple and concise statement of metrics for the committee to track in order to assess the impact of the published document over time to achieve the benefits to stakeholders documented under C.4.10 above.' The second bullet point is: '- A statement assessing the prospect of the resulting document(s) being compliant with, for the IEC, the IEC Global Relevance Policy; http://www.iec.ch/members_experts/refdocs/ac_cl/AC_200817e_AC.pdf and for ISO, with ISO's Global Relevance Policy http://www.iso.org/iso/home/standards_development/governance_of_technical_work.htm and the ISO/TMB recommendations (see NOTE below) regarding sustainable development and sustainability, where relevant.' Below this list is a NOTE: 'NOTE For ISO, the ISO/TMB confirmed the following recommendations: 1) When a committee (in any sector) develops a document dealing with sustainability/sustainable development the document must remain within the context of the committee's scope of work; 2) The committee should also notify the TMB with the title and scope as early as possible; 3) The committee undertaking such work should clarify its intentions in the Introduction of the specific standard(s); 4) The most widely used definition of sustainable development is the one from the UN Brundtland committee on sustainable development: development that meets the needs of the present without compromising the ability of future generations to meet their own needs.' The final bullet point is: '- A statement assessing the proposal's compliance with the Principles for developing ISO and IEC Standards related to or supporting public policy initiatives (for ISO see Annex SO in the Consolidated ISO Supplement and for IEC and ISO see *Using and referencing ISO and IEC standards to support public policy* <https://www.iso.org/sites/policy/>) and the possible relation of the resulting document(s) to public policy, including a statement regarding the potential

A.6 : Request to IB



International Electrotechnical Commission
International Organization for Standardization
National Adoptions Reference Database

xc-pjl | Access level: Reader | [Logout](#)
[Home](#) [By International Std](#) [By country](#) [By TC/SC](#)

ISO and IEC have been collecting data on national adoptions of international standards. The purpose is to provide the market with greater transparency regarding the use of international standards in member countries.

The database has currently some 230,000 records on national adoptions of ISO and IEC standards.

There is a search function based on the reference of the International Standard or the national adoption.

You may also browse the database by clicking on the the buttons above and selecting among the following views:

- By International Standard
- By country
- By TC/SC

[Maintenance](#)

Users who have been assigned a maintenance role can click [here](#) for accessing the maintenance area in order to modify existing records or add new ones.

[Queries](#)

For any questions or comments please contact helpdesk@iec.ch at IEC Central Office or [the ISO TMB Secretariat](#) at ISO Central Secretariat

Web page created 2022-09-01

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Recommend that the IEC Board consider setting up a project on IEC Adoptions data to increase transparency and demonstrate the global relevance of IEC standards.

ahG 93 Members

Convenor	Mr Michael Teigeler	DE
Secretary	Mr Peter J Lanctot	IEC Secretariat
Member	Mr Miguel Ángel Aranda Gómez	ES
Member	Ms Sonya M. Bird	US
Member	Mr Tadashi Ezaki	JP
Member	Ms Bettina Funk	SE
Member	Mr Simone Germani	IT
Member	Mr Hao HU	CN
Member	Mr Daehyun Kwon	KR
Member	Ms Nadine Petermann	DE
Member	Mr Emmanuel Petit	FR
Member	Mr Rajeev Sharma	IN

Thank you!



Kahoot!



United States
National Committee
of the IEC





Online Standards Development Member commenting using the IEC online platform

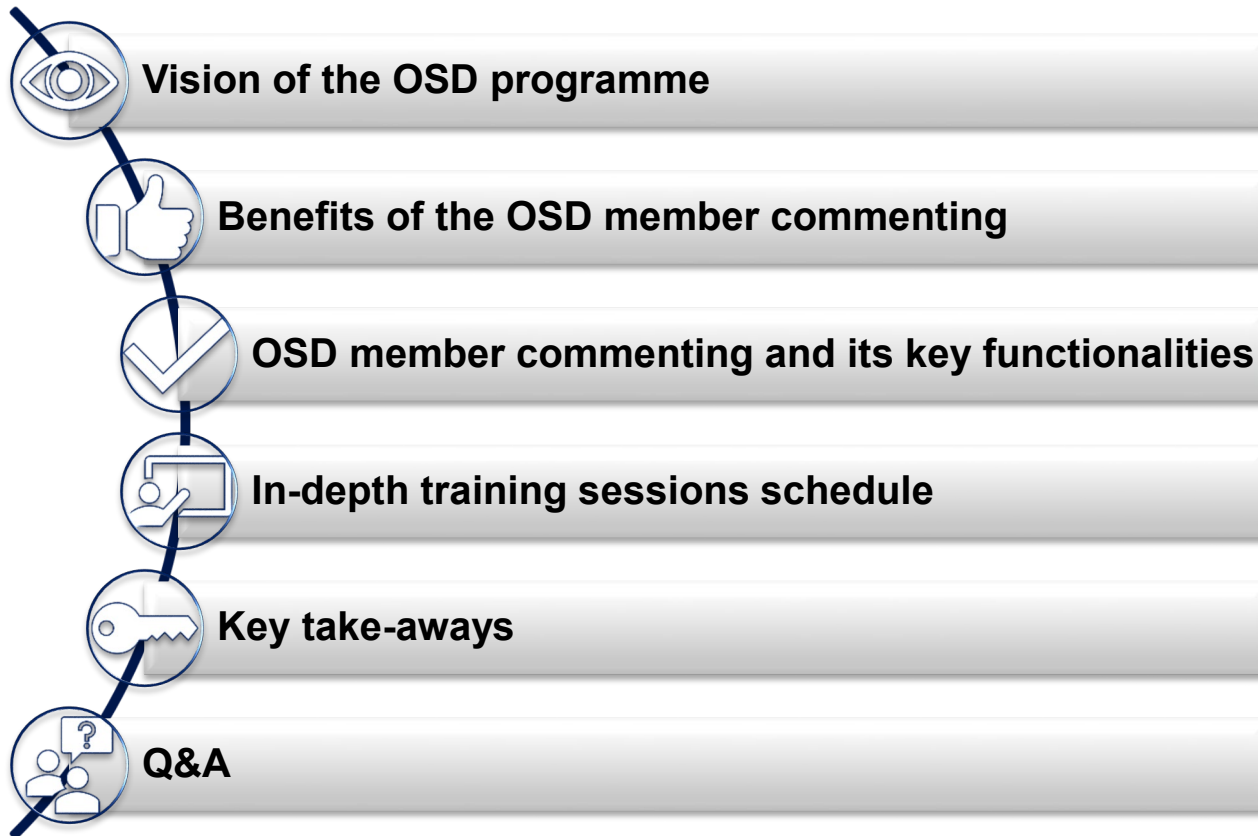
Ian Gardner
IEC Academy &
Capacity Building

USNC Training
12 September 2022



International
Electrotechnical
Commission

Agenda

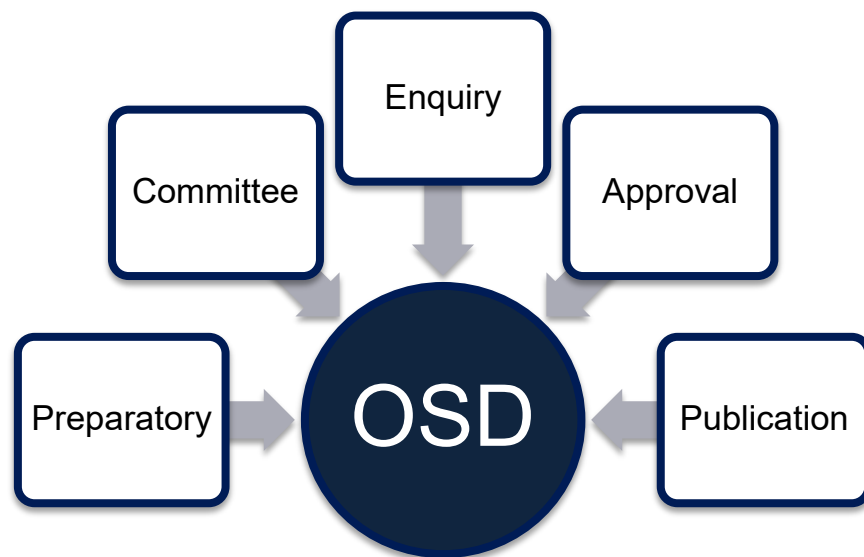


Vision of the OSD programme



Creating an **online** environment for **standards developers** in which they can work **efficiently and collaboratively**, and lay the foundation for **new value-added products** and **services** for the **world of tomorrow**.

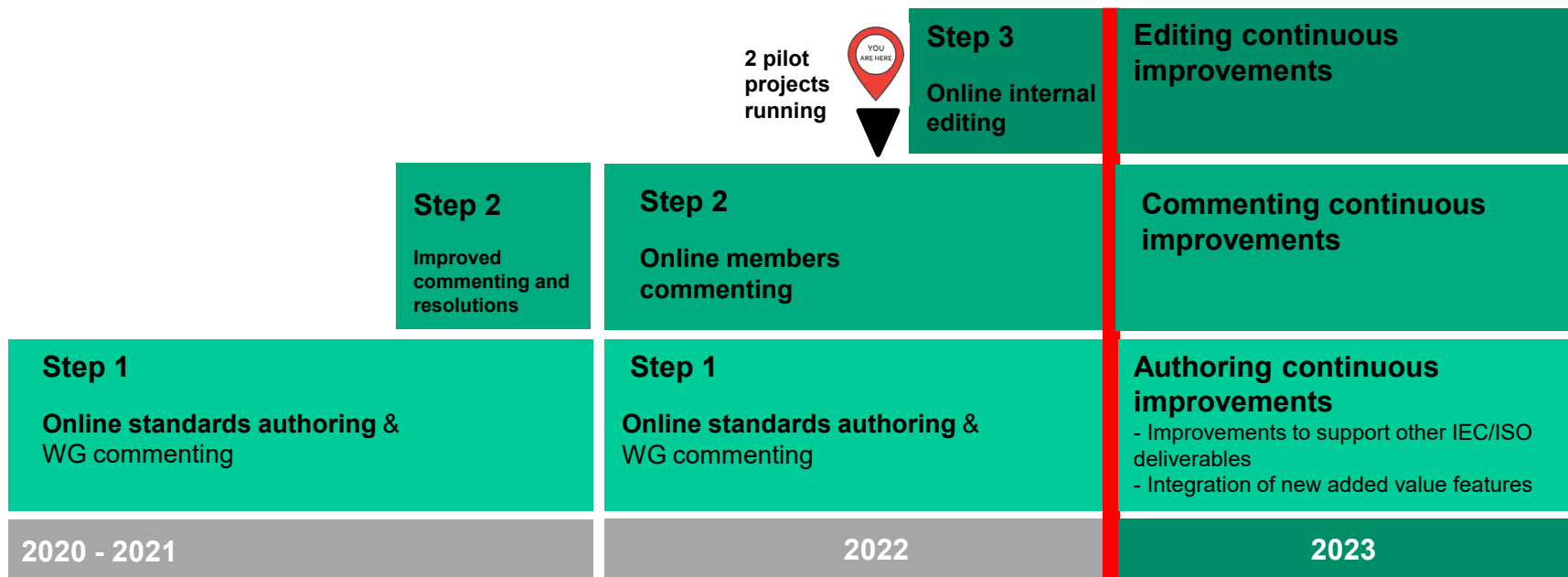
The full international standards development process in **one platform**



OSD programme

- **Online Standards Development programme**
- **Collaboration of IEC/ISO**
- **Based on editing tool (Fonto), intuitively and easy to use**
- **Integrated with IEC systems & processes**
- **Collaborative platform**
- **Tailored to the needs of people involved in standards development & consensus building**
- **Facilitating commenting & comment resolution**
- **Preparing the ground for new products & services**
 - flexibly publishing to different platforms
 - making standards easier to use

Programme timeline

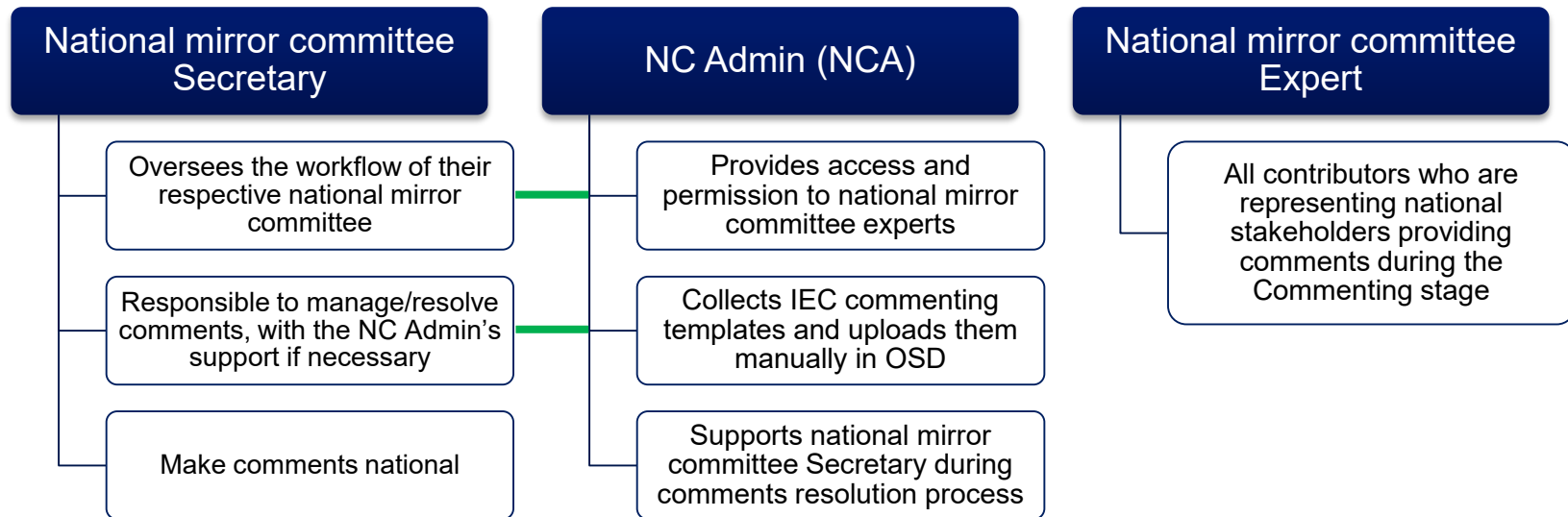


Roll out to IEC/ISO community
on a voluntary basis

Benefits of the OSD member commenting



Roles



— Applicable when the NC Admin and the national mirror committee Secretary are the same person

Facilitate your national contribution

The OSD member commenting features have been designed to facilitate the process of your national contribution during the Commenting stages:



Improved and **simplified commenting practice** for national mirror committee experts



More collaborative work and consensus building for an **efficient consolidation format** for the NCA & **easier resolution process** for the national mirror committee Secretary



Facilitated submission of national position for NCA and national mirror committee Secretary

Main goal

Provide a secure environment for experts to **make their comments directly** in the context of the draft

- ❖ No more need to work with two separate documents (draft document + commenting template)!

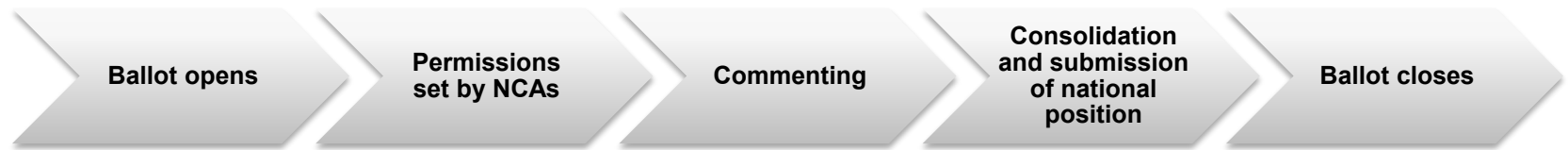
Major considerations

- Access to the online document **fully secured**:
 - Each national contributor will have access with an IEC credential or through a joint IEC/ISO authentication system (PingOne)
 - NCAs serve as **gatekeepers** to the online draft
 - NCAs can **identify** each contributor and their comments
 - Other NCs cannot read/view your NC's internal comments until they are submitted as a national position to the IEC
- **PDF** and **extract of comments downloadable** for reference/archive

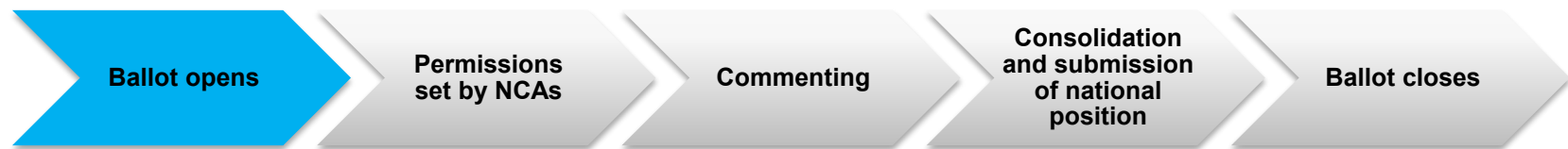
OSD member commenting and key functionalities



Commenting stages



Commenting stages



1. **TC/SC Officers inform the IEC Secretariat that the draft is ready for circulation to NCs.**
 - ✓ IEC Secretariat will publish the link to the draft
2. **Dissemination of Committee Draft (CD):**
 - ✓ Working document is “frozen” to WG experts from the moment it is published and disseminated to the NCs

Online CD document

The screenshot displays the IEC online CD document interface. The top navigation bar includes the IEC logo, a search bar, and a dropdown menu for 'Other actions' with options for 'CD' and a user profile icon. The left sidebar shows a hierarchical table of contents with sections like 'Front matter', 'Body', and '3.2 pointing devices'. The main content area is divided into two sections: 'INTRODUCTION' and 'SCOPE'. The 'INTRODUCTION' section contains text about prescribing ratings and characteristics for capacitors. The 'SCOPE' section, labeled 'CLAUSE 1', describes the applicability of IEC 60384-1 to fixed surface mount capacitors. The right sidebar provides an 'Overview' of the document, listing tables and figures, including 'Table 1 New table', 'Table 2 Marlene's table', 'Table 3 Qualification approval on the basis o...', and 'Table A.1 Screw-type terminals'.

IEC

Other actions ▾ CD 👤

« 🔍 Search ...

Front matter ▾

- FOREWORD
- INTRODUCTION

Body ▾

- 1 Scope
- 2 Normative references
- 3 Terms and definitions ▾
 - 3.1 Abbreviations
 - 3.2 pointing devices ▾
 - 3.2.1
 - 3.2.2
 - 3.3 hairbrush
 - 3.4 performance grade 2 ca...
 - 3.5 surface mount capacitor
 - 3.6 performance grade 1 ca...
 - 3.7 performance grade 3 ca...
 - 3.8 rated voltage

CLAUSE INTRODUCTION

The object of this is to prescribe preferred ratings and characteristics and to select from IEC 60384-1, the appropriate quality assessment procedures, tests and measuring methods and to give general performance requirements for this type of capacitor.

Test severities and requirements prescribed in detail specifications referring to this sectional specification shall be of equal or higher performance level, lower performance levels are not permitted.

CLAUSE 1 SCOPE

Scope

This part of IEC 60384-1 is applicable to fixed surface mount capacitors for direct current, with metallized electrodes and polyphenylene sulphide dielectric for use in electronic equipment. These capacitors have metallized connecting pads or soldering strips and are intended to be mounted directly onto substrates for hybrid circuits or onto printed boards. These capacitors may have "self-healing properties" depending on conditions of use. They are primarily intended for applications where the a.c. component is small with respect to the rated voltage. Use the test methods in here.

Also see 6.3.

Capacitors for radio interference suppression are not included, but are covered by IEC 61754-20-

Overview

- ☒ Tables ☐ Formulae
- ☐ Figures ☐ Footnotes

▾ 4 Detail specifications

Table 1
New table

Table 2
Marlene's table

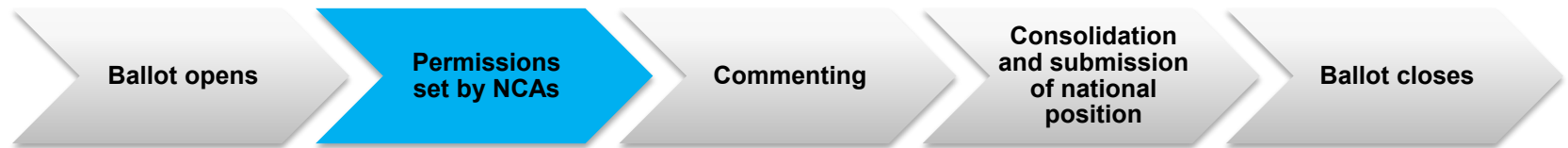
▾ 6.3 Qualification approval on...

Table 3
Qualification approval on the basis o...

▾ A.1 Screw-type terminals

Table A.1
Screw-type terminals

Commenting stages



1. **NCA receives notification of the CD document (document seen in previous slide)**
2. **NCA gives access and permissions to relevant national mirror committee experts via a new interface**

NCAAs providing access

The screenshot displays the IEC system interface. On the left, a sidebar contains 'Main', 'Resources', and 'Permissions' (highlighted). The main area is titled 'Permissions' and features a search bar. Below it is a table with columns: USER, PROJECT, STAGE, ROLE, COUNTRY, and STATUS. Two rows are visible: one for 'Mr deexpert2 deexpert2' and another for 'Mx deexpert1 deexpert1'. A red box highlights the 'Actions' dropdown menu for the first row, which includes options like 'Actions', 'Standalone Actions', and 'Add Commenters'. A large blue arrow points from this menu to a modal window titled 'ADD COMMENTERS'. This modal contains dropdowns for 'Project' (set to 'Demo Document') and 'Stage' (set to 'Committee Draft'), and a text field for 'Emails' containing 'deexpert1@iec.ch'. At the bottom of the modal are 'Cancel' and 'Add commenters' buttons.

IEC

Press / to search

DE_NC DE_NCadmin1

Main

Resources

Permissions

Permissions

Search

USER	PROJECT	STAGE	ROLE	COUNTRY	STATUS
Mr deexpert2 deexpert2	Demo Document	Committee Draft	NC Commenting		Active
Mx deexpert1 deexpert1	Demo Document	Committee Draft	NC Commenting	Germany	Active

1-2 of 2

ADD COMMENTERS

Project * Demo Document

Stage * Committee Draft

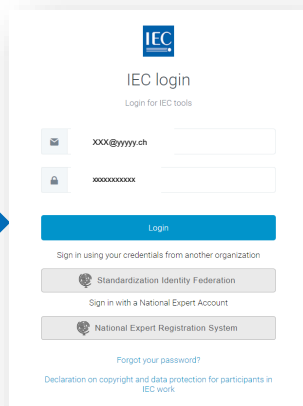
Emails * deexpert1@iec.ch

Add emails separated by ";" or ";" or one per row

Cancel Add commenters

National mirror committee experts authentication

National mirror committee experts follow the link to the online draft



IEC login
Login for IEC tools

xxx@yyyyy.ch
xxxxxxxxxxxx

Login

Sign in using your credentials from another organization

Standardization Identity Federation

Sign in with a National Expert Account

National Expert Registration System

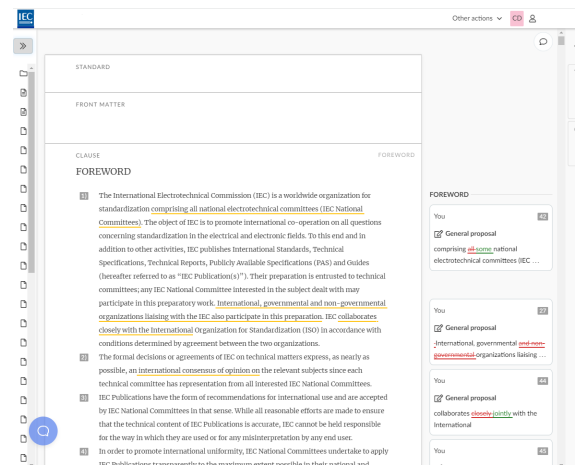
Forgot your password?

Declaration on copyright and data protection for participants in IEC work



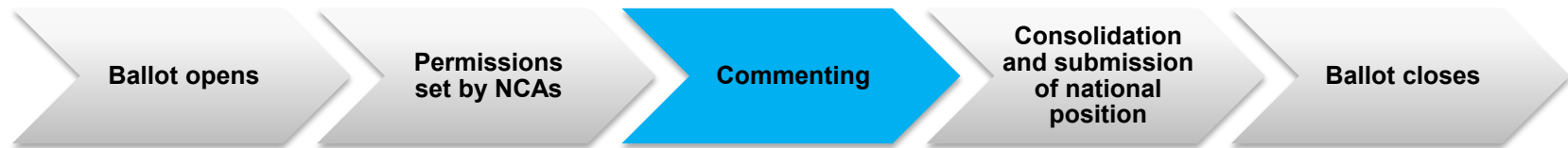
Authorized national experts register using SIF accounts

Authorized national experts without a SIF account can self-register by creating new credentials (PingOne)



Access online draft to comment

Commenting stages



National mirror committee experts submit their comments on draft

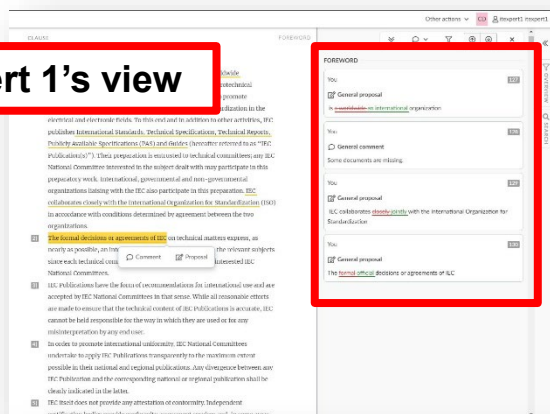
Two
commenting
methods

1. Directly through OSD
(future-oriented solution)

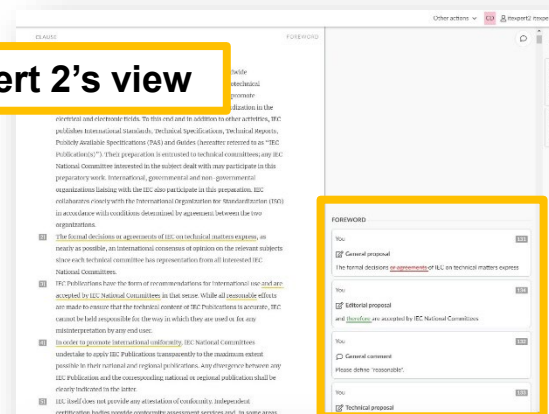
2. Using the IEC commenting template within OSD
(temporary solution)

Visibility of comments

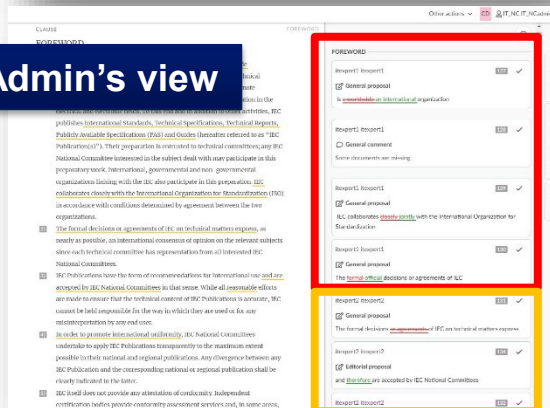
IT expert 1's view



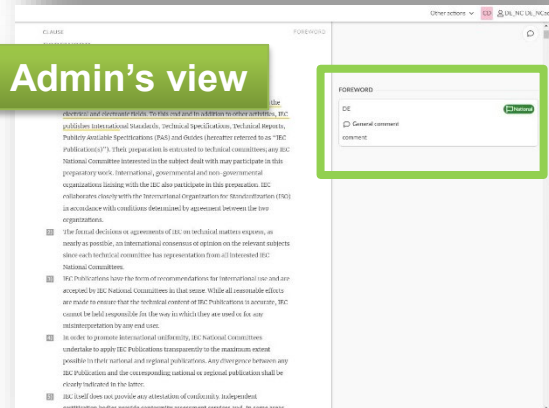
IT expert 2's view



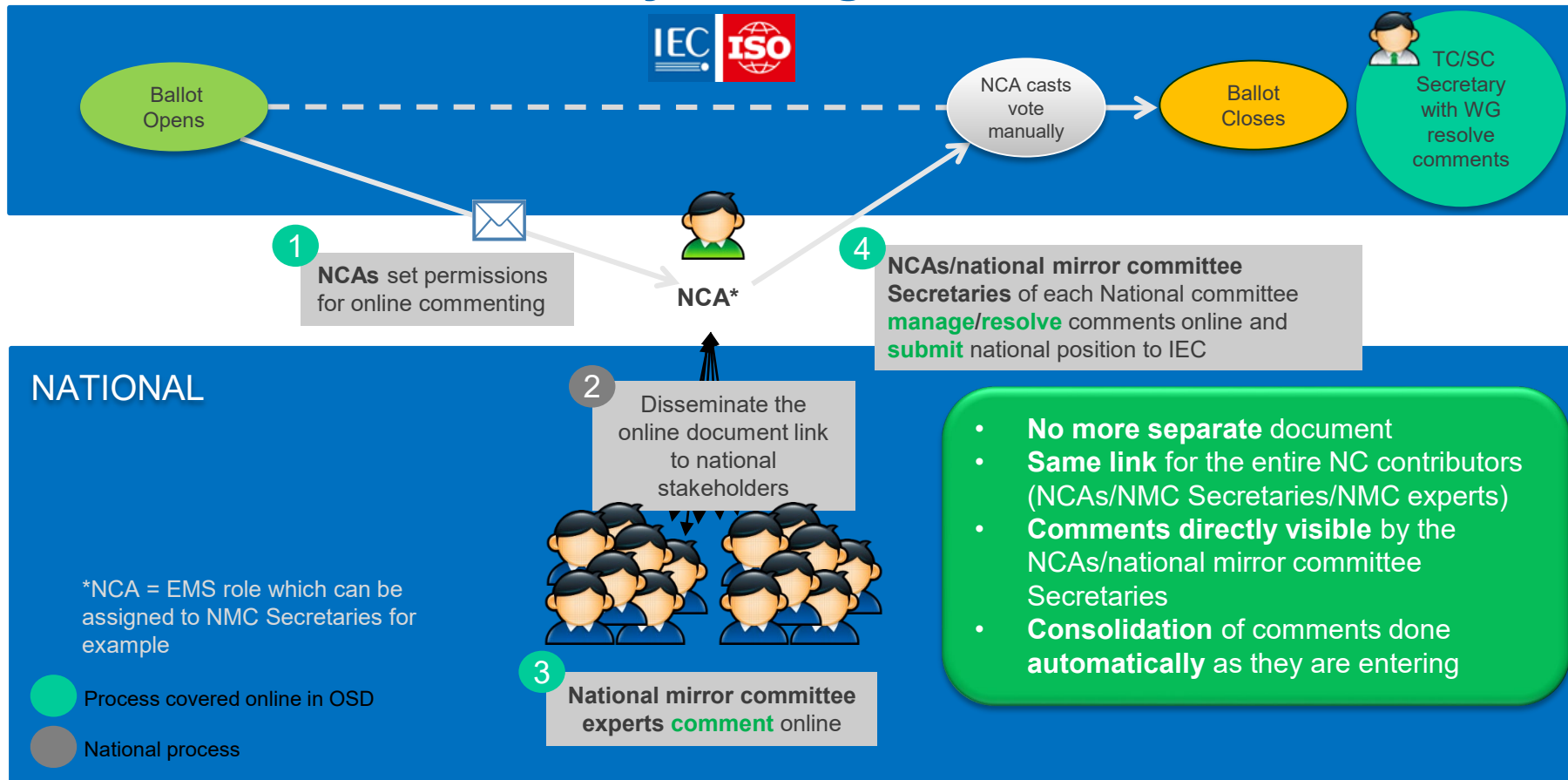
IT NC Admin's view



DE NC Admin's view



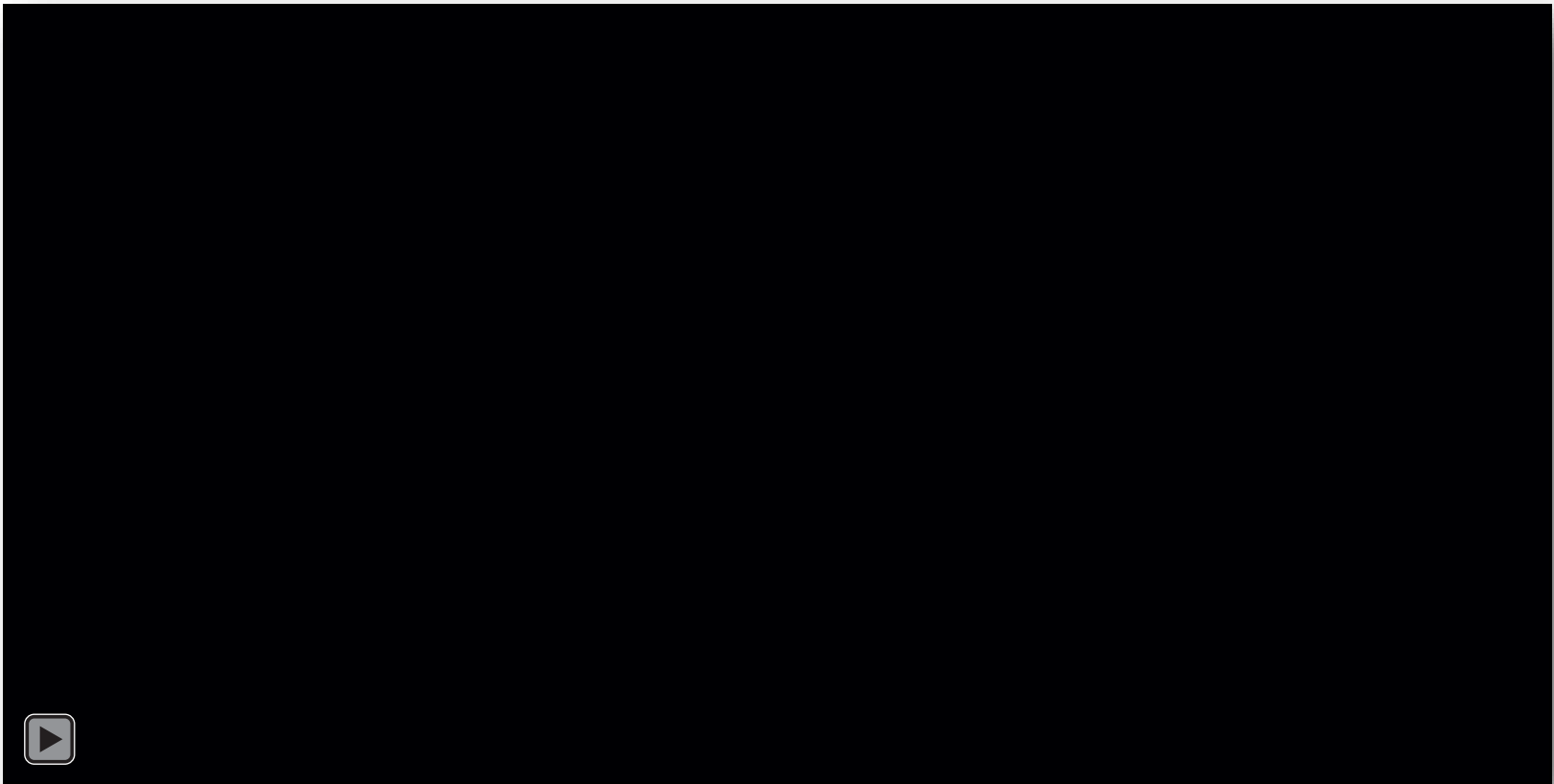
Future-oriented commenting method Directly through OSD



Features – Commenting directly through OSD

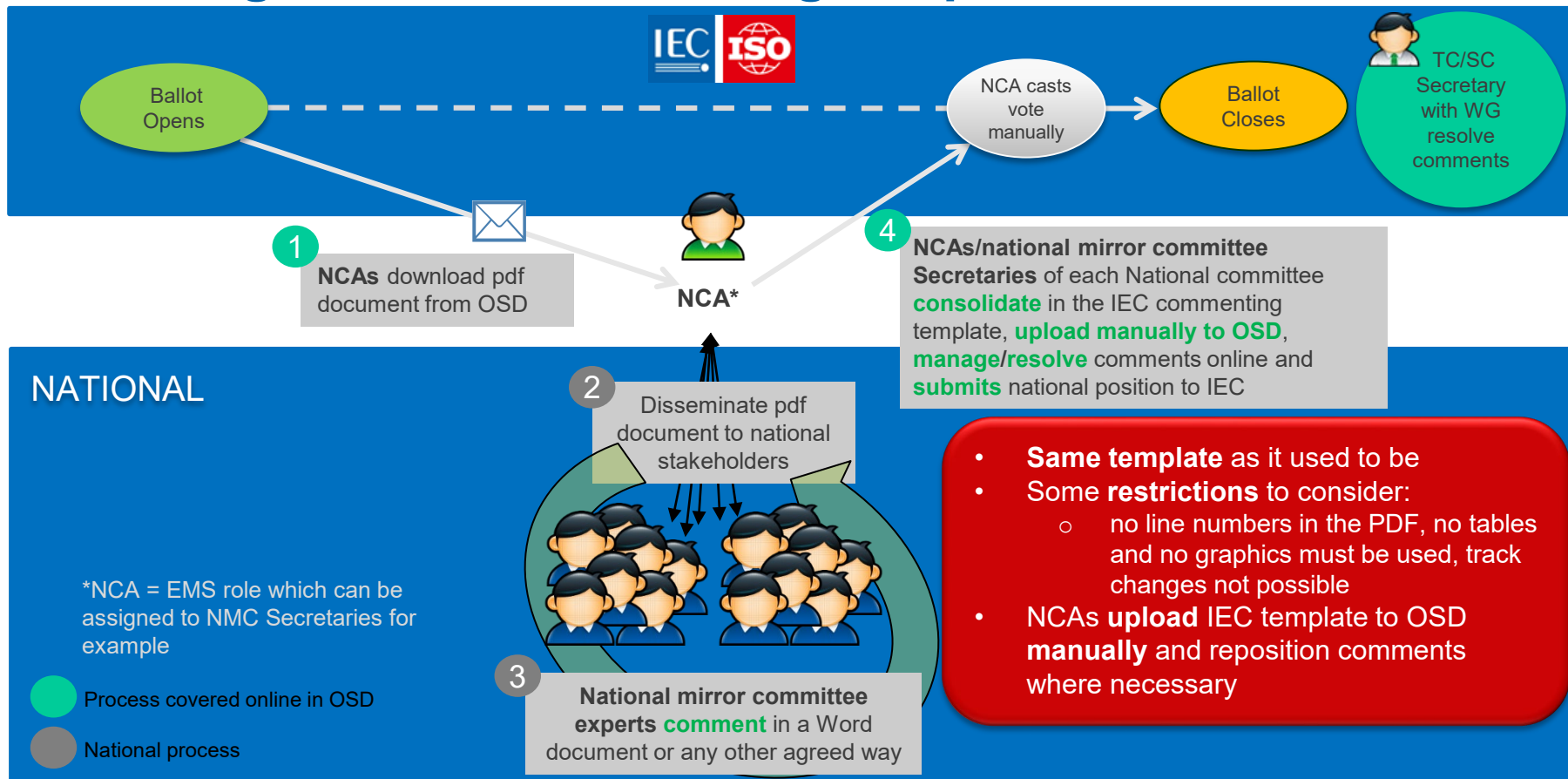
- **Set up view of the online document**
- **Different types of contributions:**
 - **Global comments:** applies to the whole document (general, editorial, technical)
 - **Specific comments:** applies to a piece of content (general, editorial, technical)
 - **Proposal:** applies to any suggestions for modifications (general, editorial, technical)
- **Edit / remove a comment or a proposal**
- **Navigate by elements (tables, formulae, figures, footnotes)**
- **Filter comments or proposals**
- **Notification for unsaved contribution**
- **Filter in selected document zone**
- **Information in the comment card**
- **View out of context comments or proposals**

Demo – Commenting directly through OSD



Temporary commenting methods

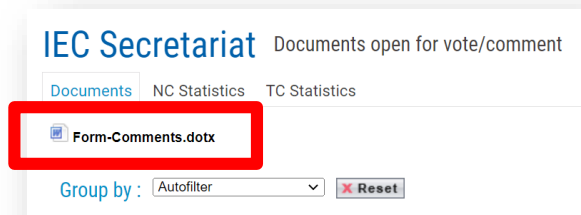
Using the IEC commenting template within OSD



Features – Using IEC comment form within OSD

- **Commenting with the IEC comment form:**

- <https://iecvotes.iec.ch/ords/f?p=203:58:303106588468786:::>



- **Restrictions to consider:**

- No line numbers in the PDF
- No tables and no graphics must be used
- “Paragraph/figure/tables” column will be ignored on import, but important for NCA who will need to reposition the expert’s comment
- Track changes will be disregarded
- Empty rows must be avoided

How to fill in the IEC comment form to integrate in the OSD?

Line number column:
must be empty!

Paragraph/Figure/Table
column: should be filled in

Comments column:
always filled in

Each row must be filled in

Template for comments and secretariat observations

Date: 2022-07-06 Document: COMMITTEE DRAFT (CD) Project: IEC 60XXX-XX EDX

MB/ NC ¹	Line number (e.g. 17)	Clause/ Subclause (e.g. 3.1)	Paragraph/ Figure/ Table/ (e.g. Table 1)	Type of comment ²	Comments	Proposed change	Observations of the secretariat
		Foreword		General	Please provide the list of main changes since the previous edition.		
		Foreword		Editorial	This is the old version of the foreword. Please update the auto text.		
		Foreword		General	IOS	ISO	
		Introduction		General	Move the second paragraph to the scope.		
		Introduction		Editorial	Do the abbreviated terms used here and in the rest of the documents need to be defined, or are they widely used in this technical context?		
		Introduction		Editorial	Please provide a title for the Figures in this document.		
	3			Editorial	Please ensure that all the terms listed are used in the text of this document.		
	4			Technical	Are the voltage values correct? To be discussed at our next meeting		
	4			General	30 mA	40 mA	
	4			General	The organisation of this document is different to the others in the series. Shouldn't we align our document structure with the others?		
	4.1			Editorial	You're	You are	
	4.1			Technical	Flatbed trux	Flatbed trucks	
	4.1			General	Do these requirements also apply to square connectors?		
	5			General	Are the IP levels acceptable for this usage? Check IEC 60529		
	5			General	Rereferring to conformity assessment in this way is not acceptable and violates the neutrality principle.		

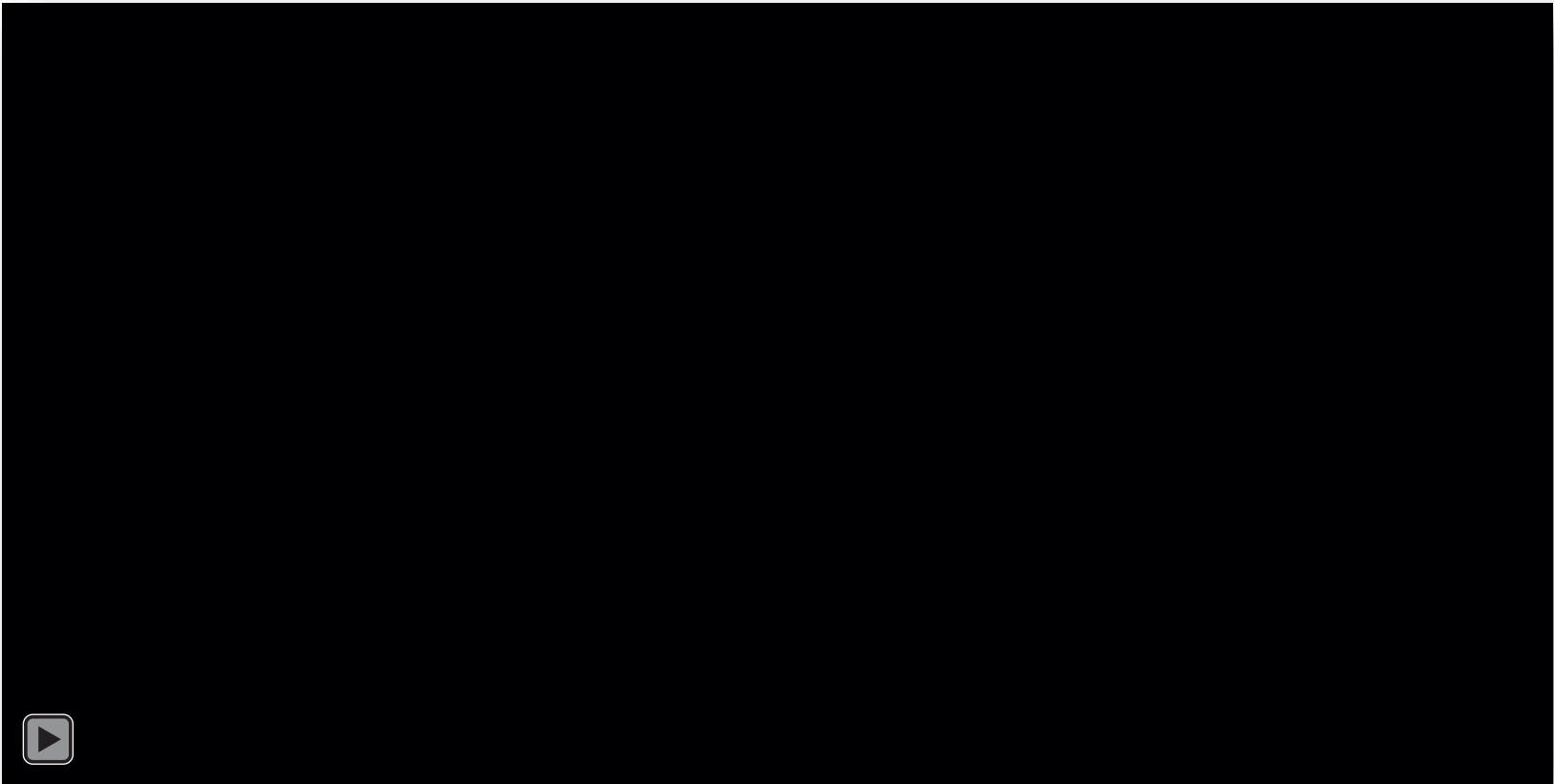
1 MB = Member body / NC = National Committee (enter the ISO 3166 two-letter country code, e.g. CN for China; comments from the ISO/IEC editing unit are identified by **)

2 Type of comment: **ge** = general **te** = technical **ed** = editorial

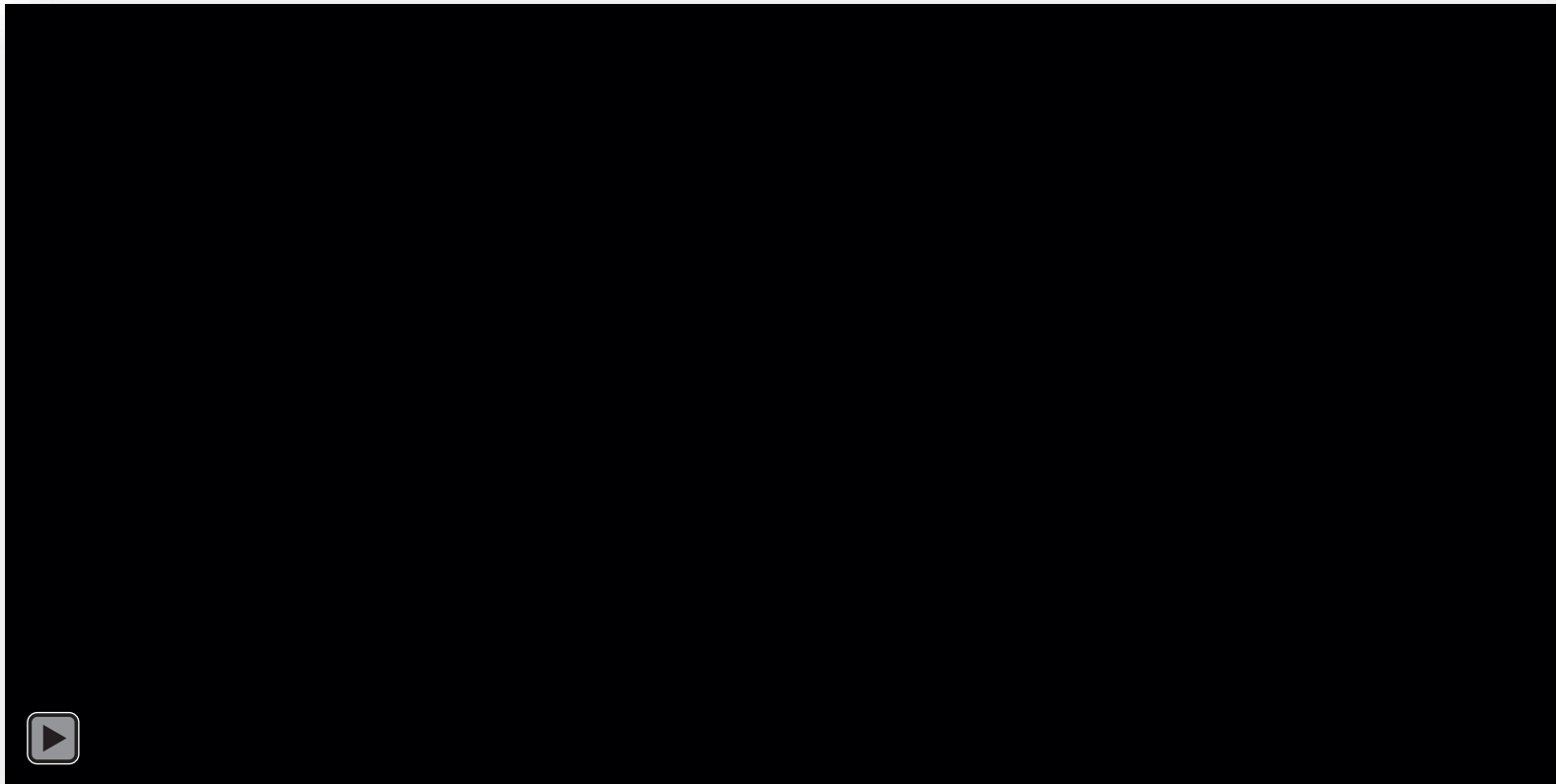
ISO/IEC/CEN/CENELEC electronic balloting commenting template/version 2012-03

page 1 of 2

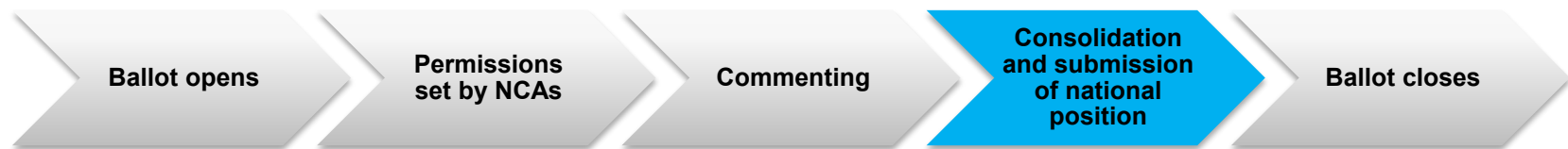
Demo – Using IEC comment form within OSD



Demo – Using IEC comment form within OSD (with errors)



Commenting stages



1. Overview of all the online comments (and consolidation of comments from IEC commenting template) by NCAs/National Mirror Committee Secretary
2. Resolution of comments by NCAs/National Mirror Committee Secretary
3. Make comments national and submission of the national position to the IEC Secretariat by NCAs

National comments submission

Each NC/NCA/national mirror committee Secretary submits the national position before the ballot closure.

NATIONAL

INTERNATIONAL

Make comment national

All NCs' comments

National mirror committee expert 1, 2, 3, n... individual comments within their respective NC

NCA/national mirror committee Secretary make comment national

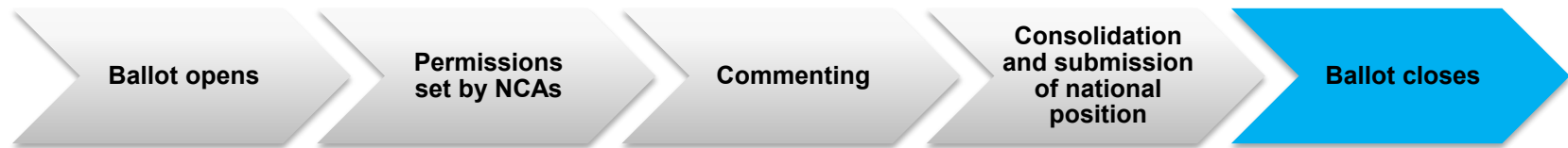
National comments are shared automatically with IEC at the end of the commenting phase

TC/SC Secretaries can view comments from all NCs in the online document

Comments are identified by the NCs' country code. TC/SC Secretaries cannot view or access national information such as expert names.



Commenting stages



1. All IEC National Committees have submitted their national position
2. TC/SC resolves comments (national positions)

In-depth training sessions schedule



Training 1

How can NCAs provide access to national mirror committee experts?

- Tuesday 20 Sept 2022 9:00-10:00 CEST
- Tuesday 20 Sept 2022 16:00-17:00 CEST

•Training 2

•How can national mirror committee experts comment?

- Wednesday 21 Sept 2022 9:00-9:50 CEST
- Wednesday 21 Sept 2022 16:00-16:50 CEST

•Training 3

•How can NCAs/national mirror committee Secretaries manage and resolve comments, and submit their national position to the IEC?

- Wednesday 21 Sept 2022 10:00-11:00 CEST
- Wednesday 21 Sept 2022 17:00-18:00 CEST

Pilot projects on-going

- **Two IEC projects** volunteered for the OSD Member commenting pilot at the CD stage

IEC SC 48B

• IEC 60512-28-100 Ed3

IEC TC 114

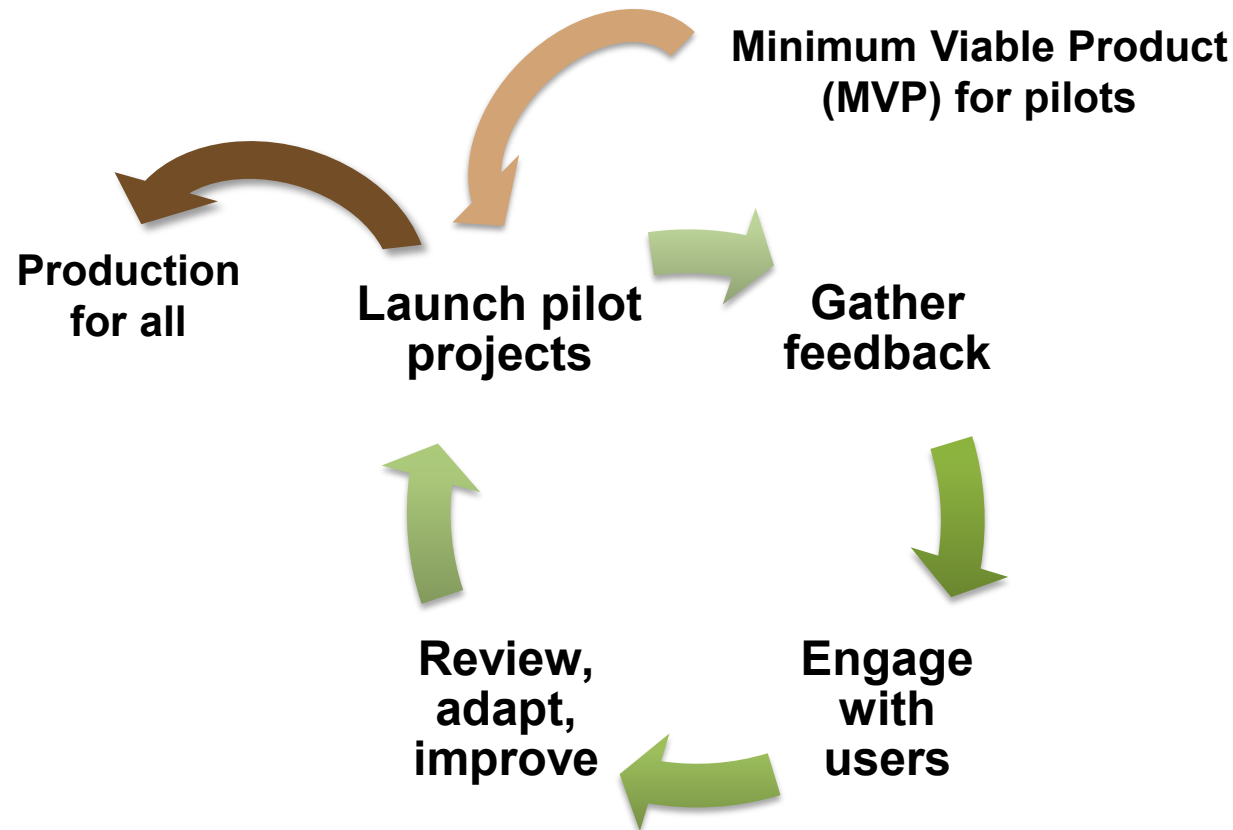
• IEC TS 62600-200 Ed2

- Identify your **NC Admins/national mirror committee Secretary** for the pilot projects
- Identify your **national mirror committee experts** who will provide national comments

Key take-aways



Going from 'pilot' to 'production'



Your participation is key!

- The Committee stage process remains the same with **less manual work** (commenting directly through OSD)
- Facilitate the work of national mirror committee experts (provide **comments directly in the context of the draft**, in one platform)
- **Join us for the training sessions** to obtain detailed insight into the OSD platform (member commenting)
- Your participation and **your feedback** are **essential** to make us aware of your NC's needs and help us further develop OSD member commenting
- The earlier, the better: be one of our early users!

Q&A





Thank you!

Ian Gardner
IEC Academy &
Capacity Building

USNC training
12 September 2022



International
Electrotechnical
Commission

ANSI Membership Resources for TAG Leaders

Kelley Cox and Susan Bose, ANSI



ANSI Corporate Family



ANSI National Accreditation Board



Who we are

- The American National Standards Institute leads standards, conformity assessment, and related activities in the United States of America
- Serves as the U.S. representative to International Organization for Standardization (ISO) & International Electrotechnical Commission (IEC)
- ANSI is not a government agency nor a standards developer
- Founded in 1918, ANSI is a private, non-profit organization



ANSI's mission

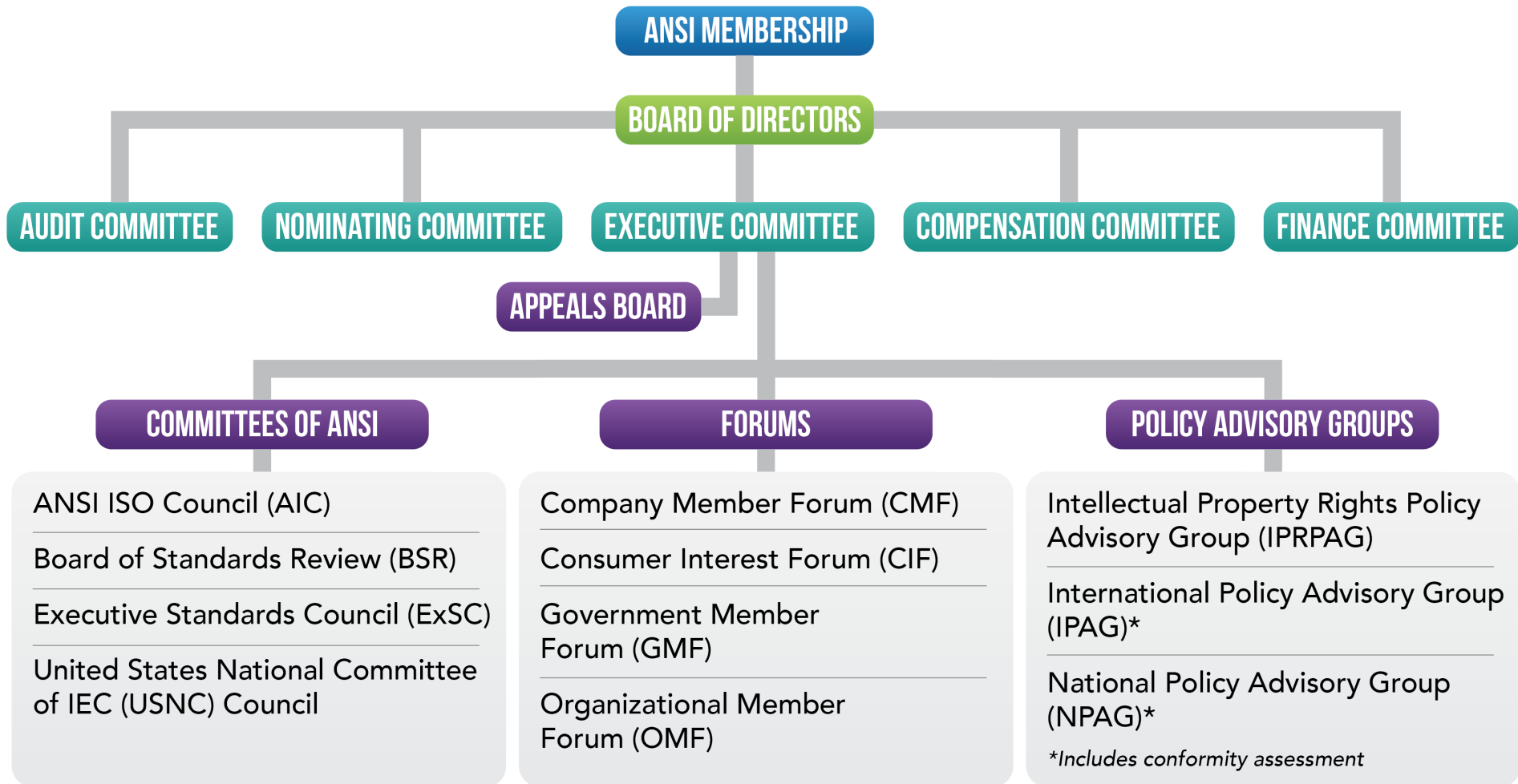
To enhance both the global competitiveness of U.S. business and the U.S. quality of life by promoting and facilitating voluntary consensus standards and conformity assessment systems, and safeguarding their integrity.



ANSI represents and serves the diverse interests of more than **270,000 companies and organizations** and **30 million professionals** worldwide.

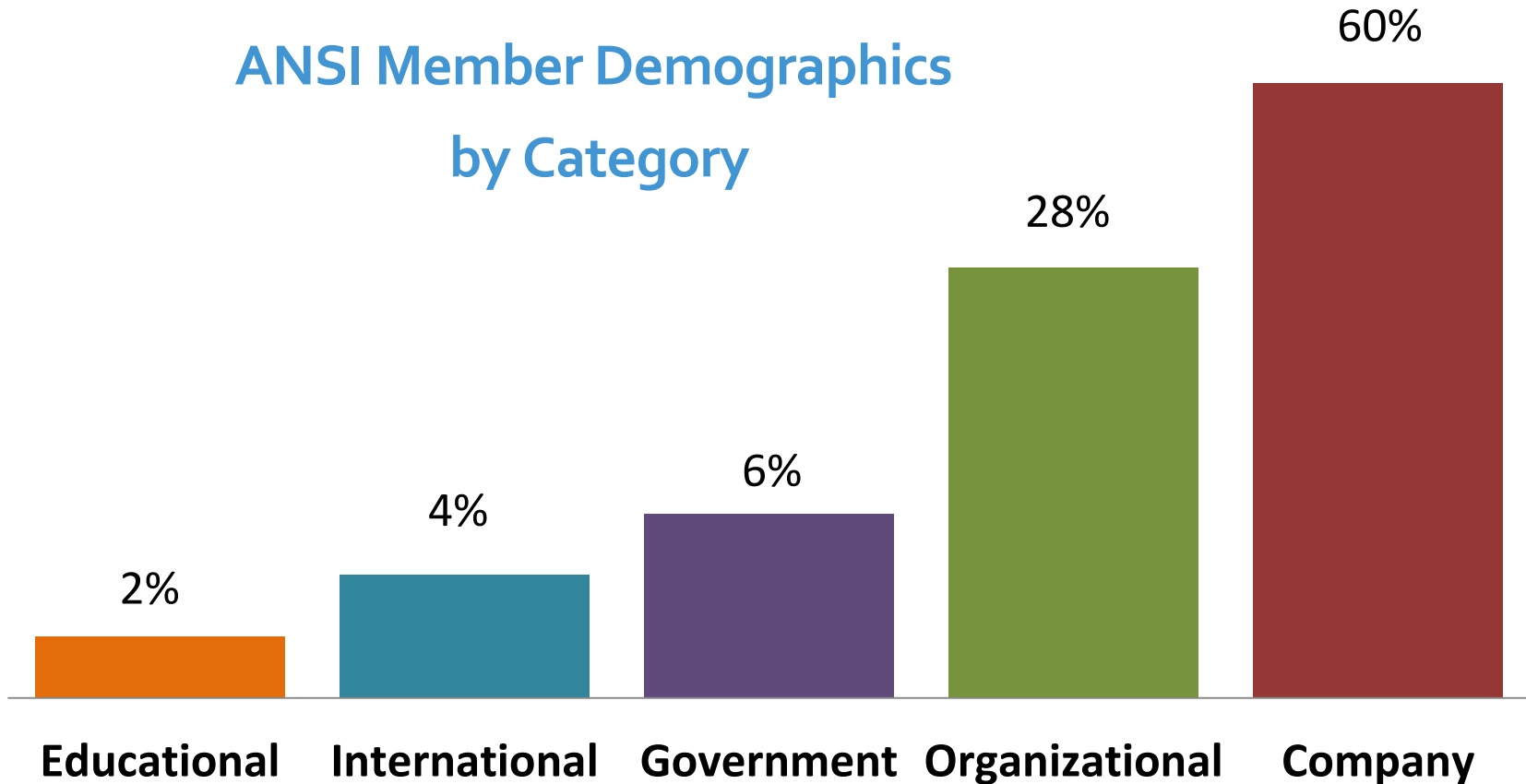
- ◆ Standards Developers
- ◆ Government
- ◆ Manufacturing
- ◆ Trade Associations
- ◆ Professional Societies
- ◆ Consumer Representatives
- ◆ Service Organizations
- ◆ Labor Interests
- ◆ Academia
- ◆ Individuals... and more

ANSI Organizational Structure



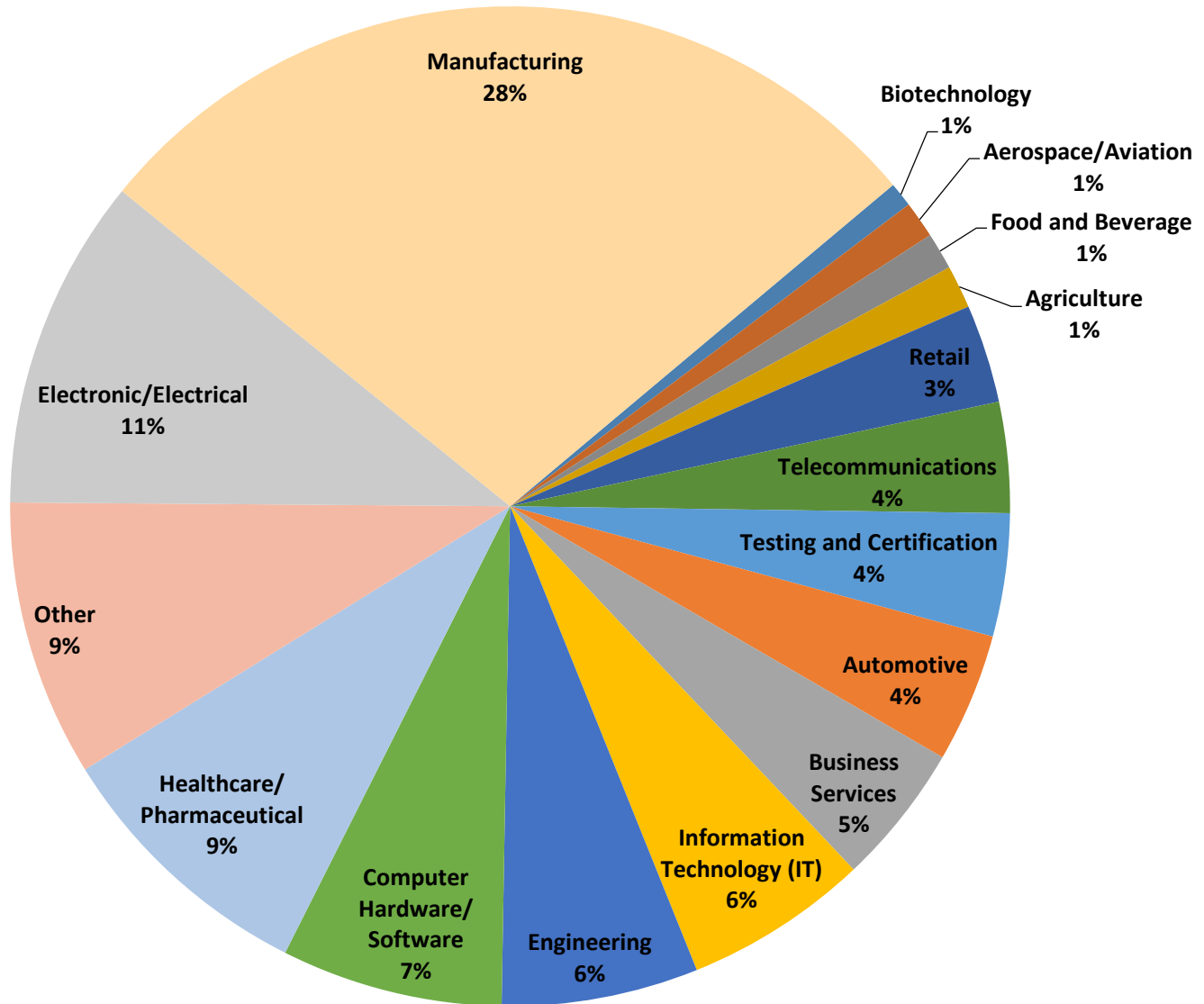
Getting to know your fellow members

ANSI Member Demographics by Category



ANSI Company Member Demographics

By Industry



How you can participate

ANSI membership will help you build relationships within the standardization community and get intelligence you won't find elsewhere.

- ◆ Take a "seat at the table":

- **Policy Advisory Groups (PAGs)**

- National Policy Advisory Group (NPAG)*

- International Policy Advisory Group (IPAG)*

- Intellectual Property Rights Policy Advisory Group (IPRPAG)

- *includes conformity assessment

- **Member Forums**

- Company Member Forum (CMF); Organizational Member Forum (OMF); Government Member Forum (GMF); Consumer Interest Forum (CIF)

- **ANSI Board of Directors**

- Nominations to the Board and Committee leadership positions are solicited every year

Member Forum Topics

- *Evolving Standards Landscape*
- *Standardization for Emerging Technologies*
- *Different Approaches to Standardization*
- *Value of Strategic Standardization*
- *Standards as Digital Data*
- *Opportunities and Updates on International Items*
- *Government Relations & Public Policy Updates*
- *SDO's Standards Digital Transformation and how the SDOs can support Company Members*
- *How can SDOs and Company Members collaborate to manage the Virtual Standards Development process in the New Normal- Open Forum Discussion*
- *U.S. Standards Strategy update*

How to stay connected

ANSI membership gives you early warning about emerging issues that could impact your business.

■ Information and News

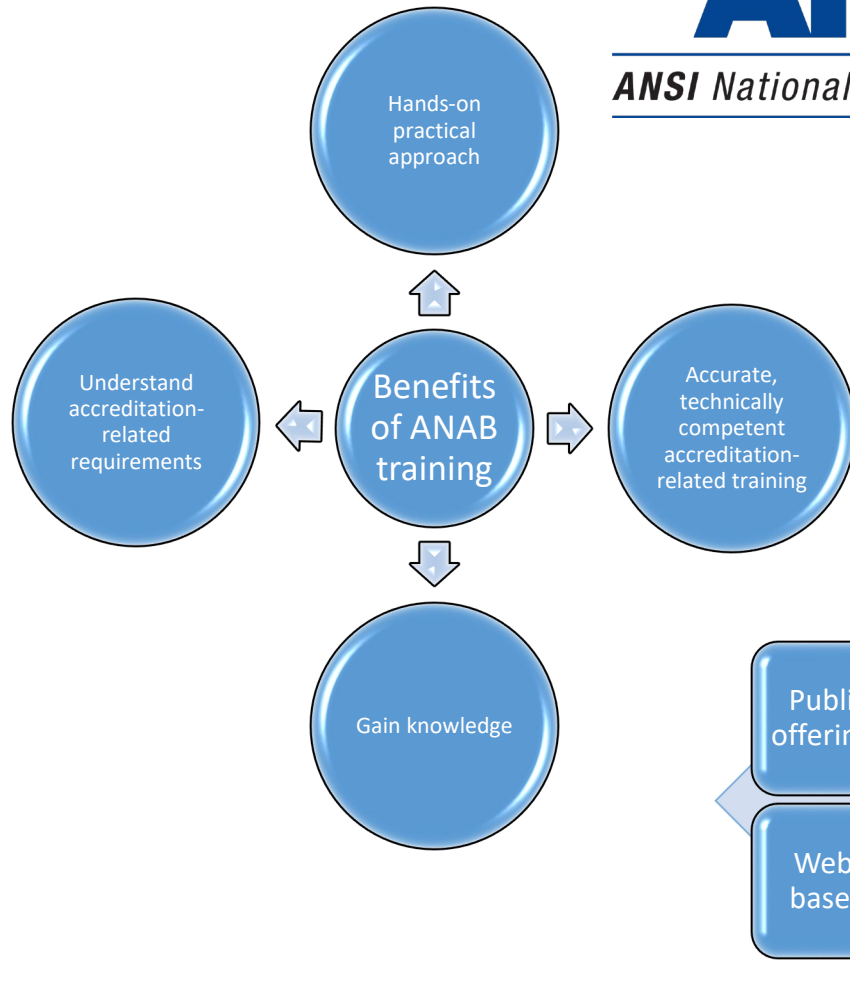
- Opportunities for international connectivity and early access for trade and policy information
- Government affairs information and outreach, including both legislative and regulatory matters
 - i. Monthly Government Relations Newsletter
- *What's New?* and *Standards Action* weekly publications
- Access to education and training courses

Member Benefits

- Up 20% discount on standards, including ISO, IEC and other select standards collection
- Discount on ANAB training programs
- Discounts to participate in ANSI events including Collaboratives, Workshops, and Networks
- The strong voice, influence and networks necessary to help ensure that standards are not written that will exclude your products, processes, or technologies
- Early awareness of new requirements
- Global relevance
- Reduced liability and redundancy
- Increased U.S. competitiveness, employment, and economic growth



ANSI National Accreditation Board



<https://anab.ansi.org/training>

Workcred Services

Connecting Stakeholders

Connecting industry, education, credentialing organizations, and others to create a more integrated and effective credentialing system

Thought Leadership

Presenting at national workforce conferences; serving on national task forces, panels, and boards

Education & Training

Convening credentialing-focused workshops, conferences, and webinars

Quality

Helping stakeholders better understand the quality, value, and effectiveness of credentials, and make informed decisions

Consulting

Building credentialing programs that meet quality standards; helping employers define their competency needs and select appropriate credentials; ensuring credentials match the current body of knowledge for an occupation; and more

Research

Conducting research to address workforce credentialing issues



Standards Collaboratives

Advance **cross-sector coordination** in the standards and conformance programs needed to support and grow **emerging technologies and markets**

Active Collaboratives:



2017: Unmanned Aircraft Systems Standardization Collaborative



2011: ANSI Electric Vehicles Standards Panel



2003: Homeland Defense and Security Standardization Collaborative



2016: America Makes & ANSI Additive Manufacturing Standardization Collaborative



2004: Nanotechnology Standards Panel

Previous Collaboratives:



2013: ANSI Network: Smart and Sustainable Cities



2010: The Financial Management of Cyber Risk



2006: ID Theft Prevention and ID Management Standards Panel



2012: ANSI Energy Efficiency Standards Coordination Collaborative



2007: ANSI Network on Chemical Regulations



2005: Healthcare Information Technology Standards Panel



2010: ANSI-NIST Nuclear Energy Standards Coordination Collaborative



2007: Biofuels Standards Coordination Panel



1994: Information Infrastructure Standards Panel

Standards Workshops

Convene stakeholders for targeted workshops to **identify potential areas for standards coordination** and **propose appropriate activities** (which may evolve into a collaborative)

Active Workshops:



2022: Global Supply Chain
Security for Microelectronics



2020: Standardization
Empowering AI-enabled Systems
in Health Care Workshop



2021: Measuring the Impact of
Standards on Health and Safety

Previous Workshops:



2020: Standardization and the
Commercial Space Industry



2018: Dietary Supplements
Standardization Coordination



2009: Workshop Toward Product
Standards for Sustainability

World Standards Week

October 10 - 14, 2022

- Evolving Standards Landscape - Joint Member Forum
- National Policy Advisory Group (NPAG)
- International Policy Advisory Group (IPAG)
- Intellectual Property Rights Policy Advisory Group (IPRPAG)
- Annual ANSI Business Meeting
- ANSI Leadership and Service Awards 2022 October 12
- U.S. Celebration of World Standards Day 2022 October 13

<https://www.ansi.org/events/standards-events/world-standards-week>

Marketing Ideas

- “Display Ads” on IEC articles on blog.ansi.org
- Article on blog.ansi.org specifically about USNC participation
- Social media posts specifically about USNC participation and related topics if any
- “Popover” on webstore when someone visits IEC standards on webstore
- Email campaign to past IEC standards purchasers
- Direct mail “postcard” campaign to past IEC standards purchasers
- Article on *What’s New* and *Did You Know*
- Collaboration on ANSI Overview webinar

Example of Blog Article



Search

Certification for AS9100 Aviation Quality Management Systems

📅 August 25, 2022 👤 Dale Gordon, Accreditation Manager 💬 Leave a comment

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Want to get in touch?

Email us at anab@anab.org



About ANAB: The largest multi-disciplinary accreditation body in North America, ANAB accredits management systems certification bodies; product, process, and service certification bodies; calibration, testing, and dimensional measurement laboratories; sampling organizations; forensic service providers; inspection bodies; validation and verification bodies; reference material producers; proficiency test providers; personnel certification bodies; certificate issuers; and food protection managers. ANAB also provides training on accreditation standards and related topics.

Example of Popover Ad

The screenshot displays the ANAB (ANSI National Accreditation Board) website. At the top is the ANAB logo, which features a torch and the text "ANAB" and "ANSI National Accreditation Board". To the right of the logo is a search bar. Below the logo is a navigation menu with links: "Accreditation", "Who's Accredited", "Training", "Feedback", "Latest News", and "Food Handlers Permit". The main content area has a header image with the text "LATEST NEWS" and a vertical sidebar on the right that says "WE'RE HERE TO HELP". The main content area contains a section titled "Call for Nominations for ANAB Personnel Certification Accreditation Committee" with a sub-header "Submissions Are Due by August 1, 2022". Below this is a paragraph of text and a "Read More" link. A dark blue sidebar on the right contains links for "Recognition", "ANAB Blog", and "News". A dark grey popover ad is overlaid on the right side of the page, containing the text "Please answer 4 questions to help us improve. Why did you visit today?", a text input field, the "hotjar" logo, and a "Next" button.

ANAB
ANSI National Accreditation Board

Accreditation | Who's Accredited | Training | Feedback | Latest News | Food Handlers Permit

LATEST NEWS

Call for Nominations for ANAB Personnel Certification Accreditation Committee

May 24, 2022

Submissions Are Due by August 1, 2022

The ANSI National Accreditation Board (ANAB), a wholly owned subsidiary of the American National Standards Institute (ANSI), is accepting nominations from interested persons to serve on its Personnel Certification Accreditation Committee (PCAC). **Nominations must be received by August 1, 2022.**

[Read More](#)

Recognition
ANAB Blog
News

Please answer 4 questions to help us improve. Why did you visit today?

Please type here...

hotjar Next

Example of Twitter Post

The screenshot shows a web browser window displaying a Twitter post. The browser's address bar shows the URL: twitter.com/ansidotorg/status/1541852178536534016. The Twitter interface includes a left sidebar with navigation options like 'Explore' and 'Settings'. The main content area features a tweet from ANSI (@ansidotorg) asking if users are interested in learning more about the role of standards in reducing costs and ensuring quality and safety. The tweet includes a link to a complimentary Orientation Webinar and a photograph of hands typing on a laptop. On the right, there are sections for 'New to Twitter?' with sign-up options (Google, Apple, phone/email) and 'Relevant people' featuring ANSI's profile and a 'Follow' button. At the bottom of the tweet, a blue banner encourages users to 'Don't miss what's happening' and provides a 'Log in' or 'Sign up' option. Below the tweet, a table of recent messages is visible, showing conversations with Kalli, Mom, Penny Kokias, and Edward Terhune. The bottom of the screen shows a Windows taskbar with various application icons, a search bar, and system status information including the date and time (9:39 AM 9/9/2022).

Tweet Content:

Are you interested in learning more about the role standards play in reducing costs at every level of operations while also ensuring #Quality and #Safety? If you're curious to find out more, join ANSI's complimentary Orientation Webinar this Friday! [Ansi.link/Orientation-We...](https://ansi.link/Orientation-We...)

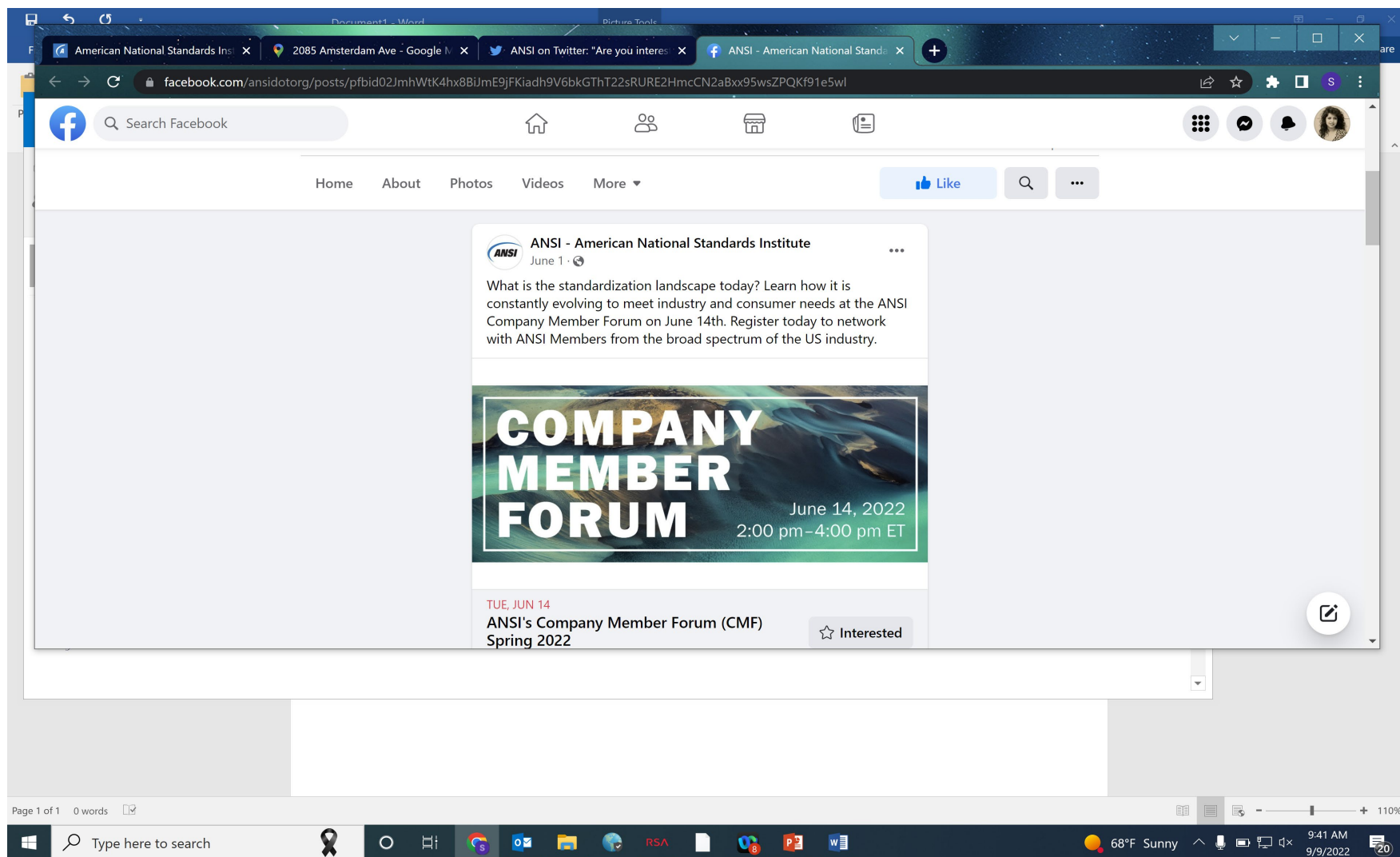
Relevant people:

ANSI @ansidotorg
American National Standards Institute: Administrator and coordinator of the U.S. private sector voluntary standardization system

Don't miss what's happening
People on Twitter are the first to know.

From	To	Subject	Content
Kalli	5	Thu 9/8/2022	IT Maintenance Alert: IT will be doing routine maintenance on phone systems on Friday, September 9th, between the hours of 6pm EDT and 8 pm EDT. How will this impact our staff? ü There will
Mom	4	Thu 9/8/2022	Hi Christian, Could you please schedule the mailing for the attached September "Did You Know?" for next week? My best, Penny <end>
		Thu 9/8/2022	RE: U.S. TAG to ISO/TC 20/SC 13 - Open L...

Example of Facebook Post



ANSI's Web-Based Information Tools

- ◆ **ANSI Online** – www.ansi.org
News and information about the Institute
- ◆ **ANSI Webstore** – webstore.ansi.org
E-commerce site for real-time electronic publication sales and subscriptions
- ◆ **Standards Boost Business** – www.standardsboostbusiness.org
Resources highlighting the value of standards activities for U.S. companies
- ◆ **StandardsPortal** – www.standardsportal.org
A standardization resource for global trade
- ◆ **Standards Learn** – www.standardslearn.org
Standards education: learning in your own space and at your own pace
- ◆ **Glossary of Definitions and Acronyms** -
https://www.standardsportal.org/usa_en/resources/glossary.aspx



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Break

We will resume at 3:00 p.m. ET

Up Next: Frankfurt Agreement & CENELEC Relations



United States
National Committee
of the IEC



The Frankfurt Agreement: What it is and how to use it

Dave Osborn, Philips



United States
National Committee
of the IEC



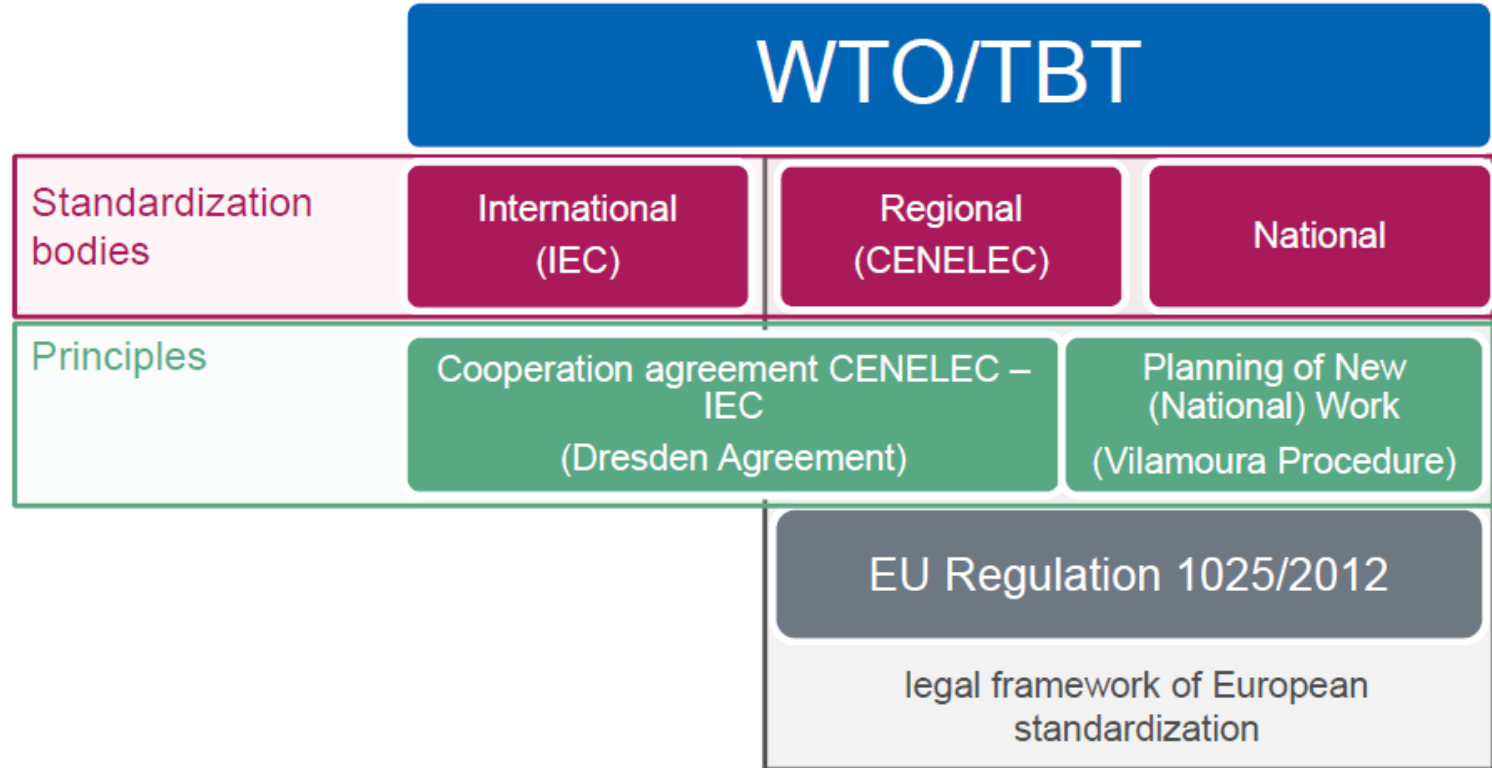
Introduction

- Today we will cover
 - Why the Frankfurt Agreement (FA) is important
 - What is the FA
 - What are the objectives of the FA
 - How are those objectives met
 - How to use and invoke the FA

- For ISO lead JWG, what is the Vienna Agreement

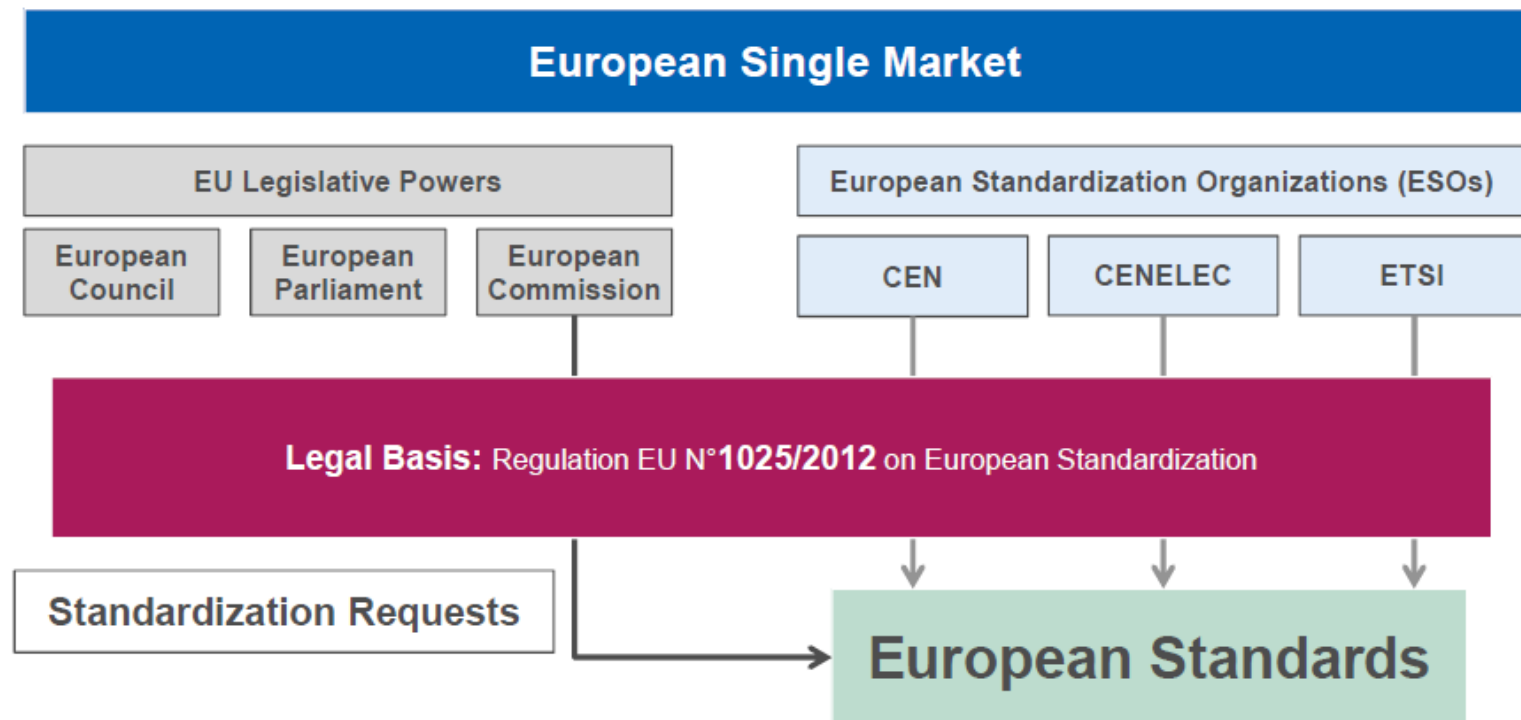


The Big Picture



The Challenge

- International Standards should be taken into account, but EC is focused on “European Standards” that address European strategic interests and European values



What is the Goal?

- US standards policy is to work toward one standard for the whole world, where practicable

One Standard, One Test, Worldwide Access

- Unnecessarily having different standards in different countries or regions are trade barriers and add cost



What is the Frankfurt Agreement?

- Between IEC and CENELEC (CLC) in 2016
 - Replaces the Dresden Agreement of 1991
 - And its 1996 amendment
- The FA is really the second edition of agreement
 - Introduces changes reflecting the evolution of both organizations over 25 years
- Fundamentally intended to avoid duplication of standardization work and having an international priority

Objectives of the Frankfurt Agreement

- Objectives of the Frankfurt Agreement (FA)
 - Commits both to primarily undertake work at the IEC level
 - Expedites the publication and common adoption of international standards in Europe
 - Optimize use of available resources
 - Ensure European interests are fully considered at the international level by IEC
 - Accelerate the standards preparation process in response to market demands

How are the objectives achieved?

- There are four methods
 - Offering New Work items of CENELEC to IEC
 - i. CLC NPs must be offered to relevant IEC TC/SC
 - Parallel voting on draft international standards
 - i. Automatically simultaneous at CDV and FDIS stages
 - Publication Requirements- mechanics
 - i. IEC 6xxxxx becomes EN IEC 6xxxxx
 - Conversion of European standards into international standards
 - i. CLC will renumber an EN to the IEC number when an EN is adopted internationally under the FA

How is new work started in IEC?

- To start a revision, the IEC Secretariat initiates a project
 - Directly with a Q document that lists the work to be done
 - Indirectly with a DC document that lists the work to be done and asking whether the IEC NCs agree to start the revision
 - In either case, the target date for publication and proposed Project Leader are indicated as well as a call for experts
- To start an amendment, the IEC Secretariat issues
 - An RR document

How to offer work under the FA

- Additionally, if the standard was not previously under the FA, the Q or DC can ask the IEC NCs to offer the work to the relevant CLC committee under the FA
- An offer under the FA may also be made via resolution at an IEC Committee meeting
- Maintenance of existing documents under the FA are automatically under the FA (unless a resolution is taken to remove the document from the FA)

How is an offer accepted?

- Once an IEC committee agrees to offer a project to CLC under the FA, the IEC Secretariat informs the relevant CLC committee
- The CLC committee must decide to accept the offer
 - Once accepted, the project is then under the FA
- Similarly, the CLC committee can ask the IEC committee to place a project under FA with a similar, but opposite process

What to do?

- US TAGs are encouraged to support using the FA for the work of their committees
 - This supports the objectives of the FA
 - Having one standard (with the right content) used worldwide is normally in our best interests
- Where the US is the Secretariat, this is straight forward as the TAG directs the Secretariat
- Where another NC hold the Secretariat, the US should be prepared to
 - Raise the issue at a plenary
 - Request the Secretariat to distribute a Q or DC

What is the Vienna Agreement?

- For those of you with JWG's or doing ISO work
- The Vienna Agreement (VA) is the ISO/CEN analog to the IEC/CLC FA
 - It is very similar to the FA with the same purpose
 - In joint work it is used when ISO has the lead for a project
- It has one huge difference
 - Under the VA, when a project is linked to European legislation, the FDIS ballot must wait for a positive HAS-Consultant assessment before being launched!
 - Effectively a European process veto

Contact Information

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Hot Button Issues & Questions



United States
National Committee
of the IEC



Hot Button Issues

Panelists:

- **Sonya Bird** (UL Standards & Engagement)
- **Megan Hayes** (NEMA)
- **Ade Gladstein** (USNC)

Moderator:

- **Valara Davis** (UL Standards & Engagement)

Hot Button Issues & Questions

Panel and Discussion

Virtual participants are encouraged to submit their questions using the chat feature during this panel discussion. The chat will be monitored by USNC staff.

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Kahoot!



United States
National Committee
of the IEC



Closing Keynote Address

Kevin Lippert, USNC President



United States
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Thank you!



United States
National Committee
of the IEC

