European Standardization Organizations

Workshop for Organizational Members in NSBs & NCs

2021-10-19 | Project 4: Open Source Solutions

Agenda

- Welcome & Project summary (25 mins)
- Processes (20 mins)
- Technical solutions (20 mins)
- Participation & funding (20 mins)
- Legal & IPR (20 mins)
- Your views + Q&A (10 mins)
- Next steps (5 mins)

Welcome

Amanda Saunders | BSI (UK) | Workshop host

Purpose

Target audience

▶ Members of the European Standardization Systems other than Standards makers (eg.legal, finance, publishing etc)

Goals of today's session

▶ To get an understanding of the commonalities and the differences between Standards Development and Open Source Development

▶ Get your input on key topics

Presenters

Amanda Saunders
BSI (UK)
Workshop host

Shannon Kiernan
CCMC (Europe)
Joint Project Leader

Derek Roche
SESKO (Finland)
Technical Solutions Workstream Leader

Camille Cloitre
AFNOR (France)
Operationalization Workstream Leader

Adrian O'Sullivan
NSAI (Ireland)
Business Model Workstream Leader

Practicalities

Speak up ☺

- ▶ Informal (but efficient)
- ▶ Use the Q&A panel anytime if you'd like the project team to answer (answered later if we run out of time)
- ▶ Use chat freely if you don't need the project team to answer
- ▶ Zoom polls
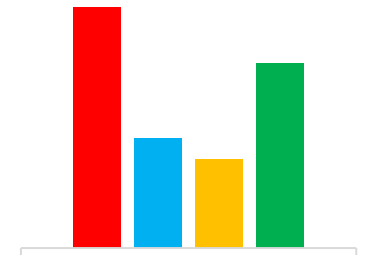- ▶ Silence ≠ agreement

Materials afterwards

- ▶ Slides on public project site (CEN/CENELEC)
- ▶ Minutes via email to attendees
- ▶ Meeting not recorded

Who is joining us today?

► Who do you work for?

► What type of skills/role do you have?

► Why did you decide to join?

► Is this your first session?

Project summary

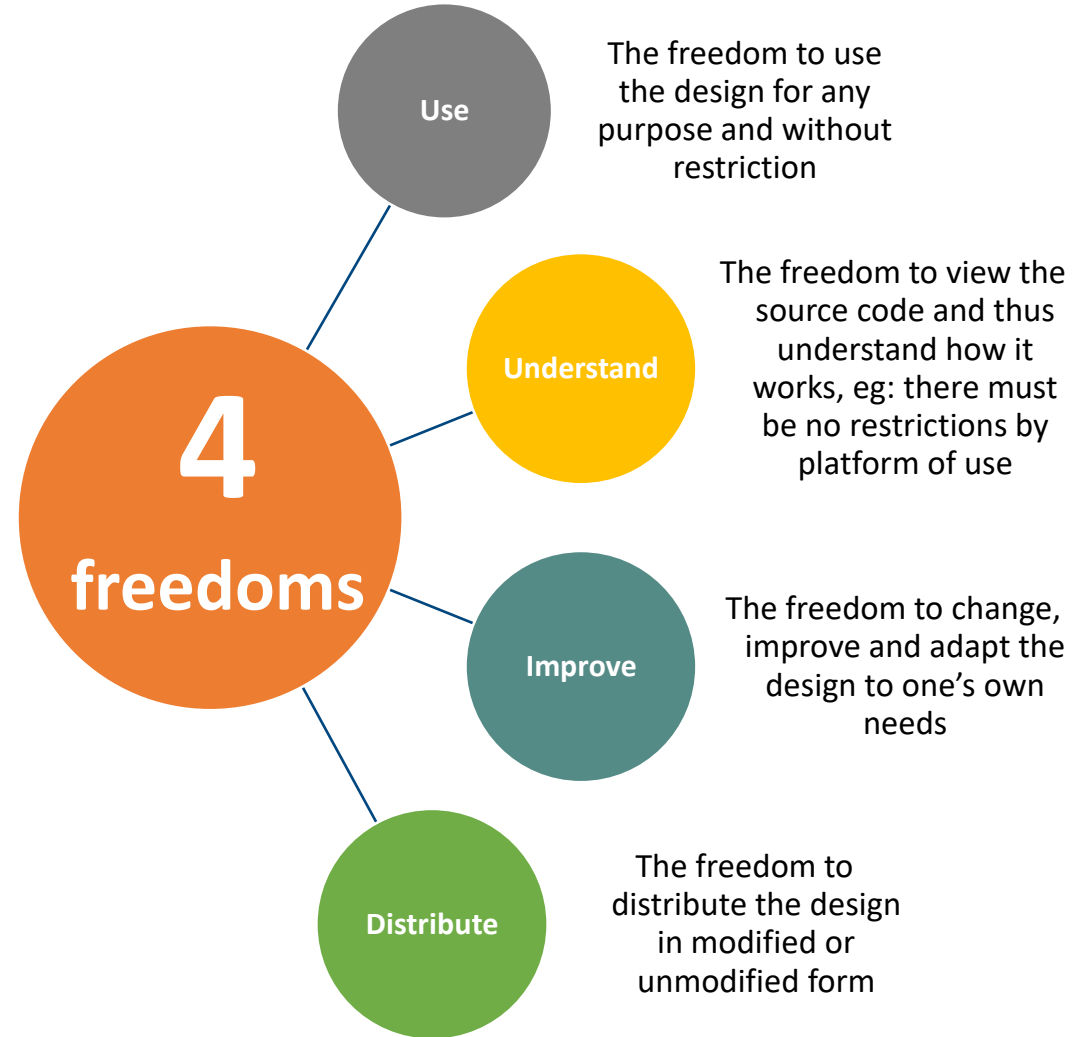Shannon Kiernan | CCMC (Europe) | Joint project leader

What is open source?

What is open source?

A design (eg: software) issued under a licence that satisfies certain criteria.

The detailed version:
Open Source Definition
https://opensource.org/osd

But the basic idea is…

4 freedoms

Use — The freedom to use the design for any purpose and without restriction

Understand — The freedom to view the source code and thus understand how it works, eg: there must be no restrictions by platform of use

Improve — The freedom to change, improve and adapt the design to one's own needs

Distribute — The freedom to distribute the design in modified or unmodified form

Examples in standardization

Electronic Invoicing

▶ Reference implementation

A software tool that produces invoices that conform with an EN
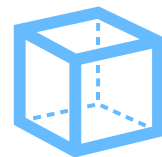
▶ Testing tool

A software tool where you import an invoice and the tool tells you whether it conforms with an EN

Industry 4.0

Software to operate a sensor array that produces interoperable data in conformity with an EN

Hardware

Design for a 3D printer that conforms with an EN

Copyleft concept

► A feature of some open source licences used to ensure the design is always distributed with equal rights.

► The user must also make the source code available again and grant the same freedoms to use, understand, improve and distribute. If the design has been changed, the source code and rights to all changes must also be made available.

OS → OS → OS → OS → OS

Common misunderstandings

Open Source costs nothing €

People often think... since many open source projects are developed publicly in a community, then open source should not cost anything.

But really... the sale of open source designs is very much permitted and a common business model, although in practice it is almost always sold as a package along with something else like hardware or support services.
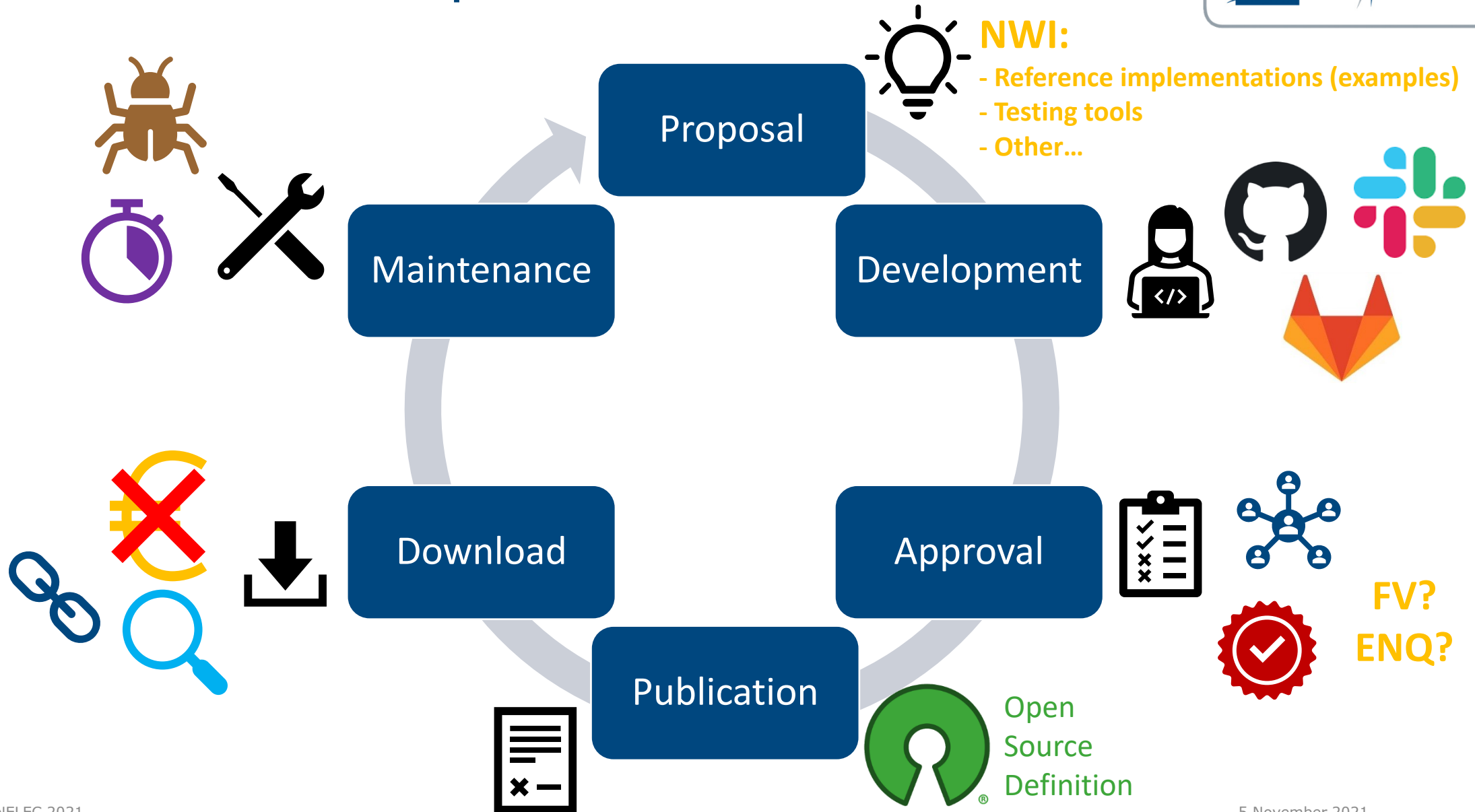
You have to return/publish changes

People often think... you have to "give back to the community" or publish changes you make to the code, especially with copyleft licences.

But really... this is a possibility, but not an obligation. It is very much allowed to make private modifications and never share them. Very often, however, companies decide to share with the community anyway, as this can make economic sense.

A framework for Open Source deliverables

NWI:
- Reference implementations (examples)
- Testing tools
- Other…

Proposal

Development

Maintenance

Approval

Download

Publication

Open Source Definition

FV?
ENQ?

To avoid confusion…

In scope:

✔ First version of a framework for a new type of deliverable

Out of scope:

✘ changes to deliverables that are already published

✘ changes to frameworks for existing deliverable types, eg: European standards (EN), technical reports (TR), technical specifications (TS)…

Why is it important?

Demand from TCs	Growing segment	Benefits for society	Potential EC funding	Testing ground for a new business model & processes	Keep standards relevant for users

Strategy 2030

Goal 2: Our customers and stakeholders benefit from state-of-the-art digital solutions

2.1 Produce standards fit for the digital economy

2.2 Transform the standards development process

2.3 Transforming our business models for the digital era

Project timeline

Original charter approved

Updated charter approved

Framework in place

| 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |

Processes

Camille Cloître | AFNOR (France) | Operationalization Workstream Leader

The context & plan so far

Initiation
- How do we identify the need for an OS deliverable in link with standardization?
- How do we approve the launch of an OS activity within the standardization system?

Development
- What platform do we need?
- OS approach v. standardization approach: competence based v. national delegation principle

Approval
- Can we reach consensus (as it is defined in our rules) on an OS deliverable?
- What kind of quality check do we need to put into place?

Maintenance
- What kind of maintenance system do we need to put into place?
- How do we deal with the disbandment of the structure in charge of developing the OS deliverable (if such a structure exists)?

Options being considered

▶ **Initiation phase:**

 ▶ Standard-first approach: proposal to launch an OS activity comes from the TC

 ▶ OSS-first approach: members of the OS communities reach out to the standardisation community

 ▶ Parallel development: cooperation needs to be fostered between standardization and OS communities to launch projects in common.

▶ Development phase

 ▶ Choice of the platform: experimentation on Github and Gitlab

Options being considered

▶ **Approval phase:**

  ▶ Workshop approach: the Chair stops the work when they find that the participants have reached an agreement (fit with an expertise based approach)

  ▶ Consensus approach: A formal approval consultation is conducted (fit with a national delegation based approach)

▶ Maintenance

  ▶ Continuous maintenance with regular updates

  ▶ Permanent structure to make sure the deliverable is maintained after publication

Questions for you (open discussion)

▶ What is your opinion on the approval phases?

▶ How do we foster cooperation between OS and standardization communities to allow for the launch of parallel projects?

▶ Where do you see the most/least differences between standardization and OS communities?

▶ Who should be eligible to participate?

Questions for you (Zoom poll)

▶ What kind of maintenance scheme should we promote?
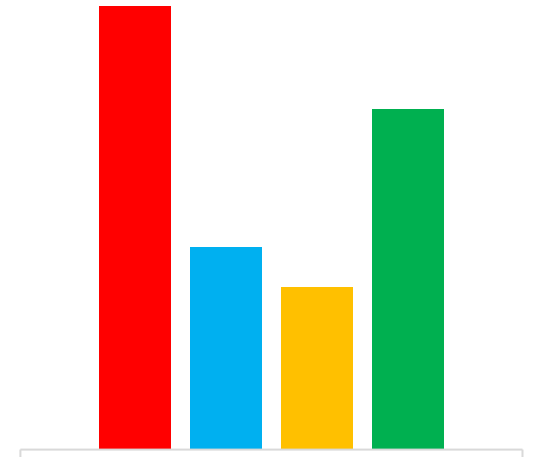
Technical Solutions

Derek Roche | SESKO (Finland) | Technical Solutions workstream leader

The context & plan so far

▶ **Repositories & tools:**

  ▶ Leverage existing tools

  ▶ Cloud hosting → flexibility

  ▶ Central CEN-CENELEC account

▶ **Metadata & discovery:**

  ▶ Search via existing member websites

  ▶ Link to repository (reference, not copy)

Options being considered

Pilot repositories

▶ **GitHub**

▶ **GitLab**

Pilot communication tools

▶ **Slack**

Questions for you (Zoom polls)

▶ Do you have experience with open-source standardization development projects?

▶ Do you see entry level open source tools as a challenge as a participant in standardization?

▶ Which repositories do you have previous experience with? (expand your answer if possible)

▶ How detailed should metadata be defined for the pilot project findings to be meaningful?
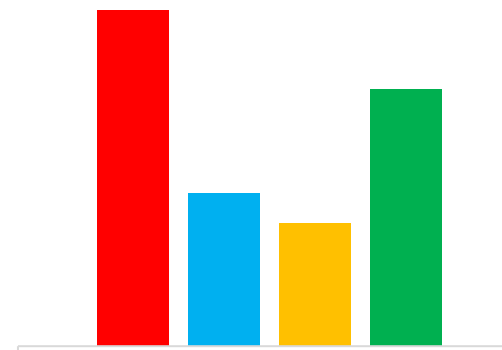
Participation and Funding

Adrian O'Sullivan | NSAI (Ireland) | Business Model Workstream

The Context – Participation

▶ Explore the possible incentives and motivation for people from Standardization to participate in Open Source projects.

▶ Investigate how Standards and Open Source Communities can work together via joint participation on CEN-CLC Open Source Solutions.

Questions for you (Zoom poll)

▶ Do you have any knowledge of the Open Source Definition https://opensource.org/osd?

▶ Do you view CEN-CENELEC having an Open Source Solutions capacity as being more of a threat or more of an opportunity for an **increase in participation in standardization**?
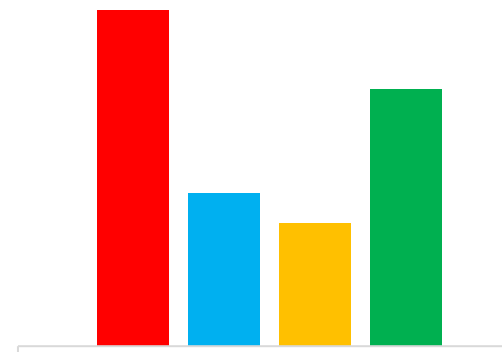
Questions for you (Open discussion)

▶ For Normative & Informative works, what benefits can you see Open Source Solutions providing to the work of existing CEN-CENELEC Standards (EN/TR/TS/CWA teams)?

▶ In what way can you see the Open Source Solution being delivered in relation to CEN-CENELEC Standards?

e.g. as a paired deliverable to a standard or separate? Free or for a cost? After the Standard is released or at the same time?

The Context – Funding

Standards Community Funding Model

CEN-CLC: Membership fees (NSBs/NCs, Companion Standardization Bodies, Affiliates, Liaisons & Partners), EC/EFTA revenue funding.

NSBs/NCs: Income differs per organization. E.g. % membership fees, sales of publications, state funding, certifications.


Open Source Community Funding Model

Open Source does not mean free in terms of money. OS Communities have costs to manage such as infrastructure, tools (Compliance/ Quality), staff (Program/Marketing/ IT/IP etc.), events, websites. Foundations fund these costs via tiered Corporate Memberships & Events hosting.

How can the costs for the OSS project be offset by the new incomes for both CEN-CLC members and OS Communities? How can we avoid negatively impacting existing revenue models?

Questions for you (Zoom poll)

▶ Do you view CEN-CENELEC having an Open Source Solutions capacity as being more of a threat or more of an opportunity for the **funding model** of your organization?
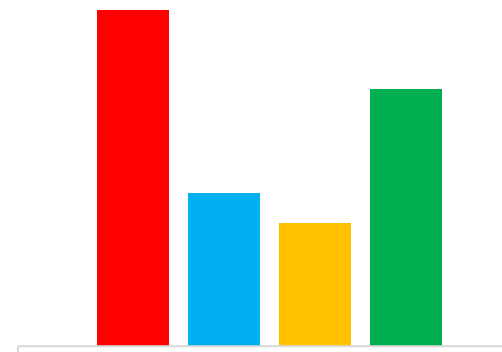
Questions for you (Open discussion)

▶ What are the pain points of the collaboration between the OS community and Standardization on your organization's funding model? What are the potential incentives and new revenues?

- What you feel would be a successful outcome?

- Any recommended examples to follow?

Licensing and IPR

Adrian O'Sullivan | NSAI (Ireland) | Business Model Workstream

The context & plan so far

Challenge : Accommodate the IPR & Licensing Policies used by Open Source Communities, while also preserving the core principles of CEN-CLC IPR policies

Licensing:

▶ Shortlist of recommended licences

▶ Identify conflicts with existing Policies

IPR:

▶ Investigate if a CLA (Contributor License Agreement) is required

Consideration of CEN-CLC standards existing Guides and Policies

Copyright, exploitation rights and other IPR

▶ CEN and CENELEC are funded primarily by the subscriptions of its Members (National Standards Bodies).

▶ Copyright is exclusive to CEN-CENELEC.

▶ Copyright may be shared with other organizations (such as ISO, IEC and ETSI) on the basis of bilateral agreements that may be concluded with these organizations.

▶ Any party participating in the work of CEN-CENELEC is requested to draw attention to any known patent, or pending patent application, that may be considered essential for the publication.

▶ The patent holders declare their willingness/unwillingness to license the patents using the CEN-CENELEC Declaration Form.

Options being considered

Licensing – currently examining:

▶ Apache 2.0

▶ MIT

▶ GNU GPL 2.0

▶ BSD 2.0 or 3.0

▶ European Union Public Licence 1.2

▶ List of licences endorsed by FSF and OSI

Examining Licenses Types such as:

▶ Permissive License Types, with and without explicit patent grants

▶ Copyleft License Types, with and without explicit patent grants

▶ Open Source Licenses used in other Standards Organizations.

Questions for you (Zoom poll)

▶ Do you think it is possible within CEN-CLC to accommodate IPR & Licensing Policies used by Open Source Communities while preserving CEN-CLC's existing IPR policies?
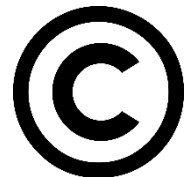
  ▶ Why? Eg: conflicts with specific guides?
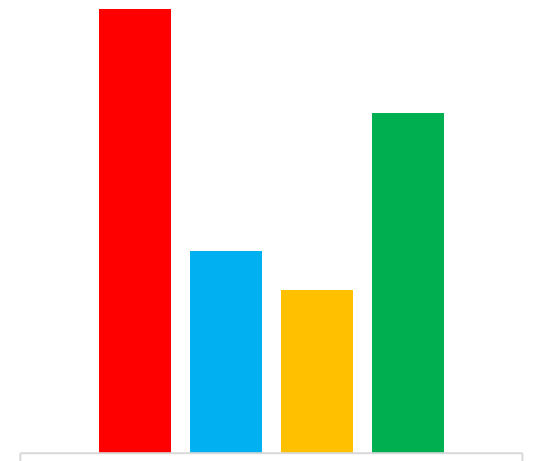
Questions for you (Zoom poll)

▶ To protect CEN-CLC Open Source Solution integration with existing policies, do you believe a CLA (Contribution License Agreement) is required ?

▶ Should CEN-CLC take exclusive Copyright of

   OSS Contributions to CEN-CLC?
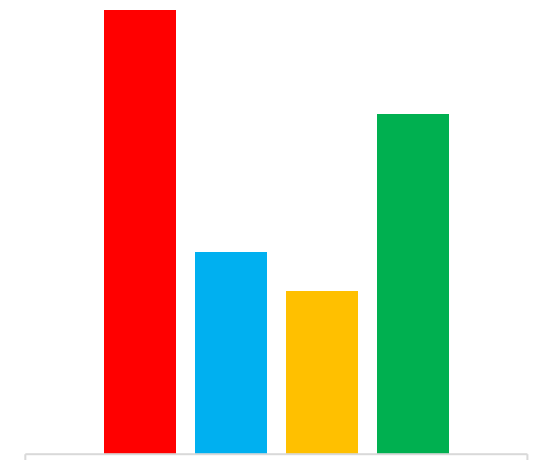
Questions for you (open discussion)

▶ What OSI Licenses or License types would you like CEN-CLC to support? Why?
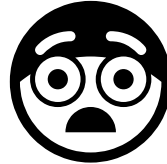
Your views

Shannon Kiernan | CCMC (Europe) | Joint project leader

How do you feel about the project?

Excited
"Bring it on!"
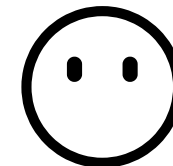
Scared
"What will this mean for...?"

Angry
"But if you do that, then...!"
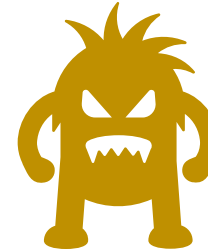
Interested
"I wonder what will happen"

Confused
"I don't get it"

Other

What do we need to look out for?

▶ What are your biggest fears?

▶ What do we need to manage carefully?

Q&A

Next steps

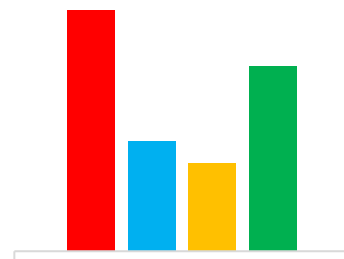Amanda Saunders | BSI (UK) | Workshop host

Other activities

Are there 2 or 3 volunteers to represent **members** at the Stakeholder Dialogue Forum on 27 October from 2 to 5pm CET?

Does anyone want to join the project team?

Do you want to be on the mailing list?

(Zoom poll)

Are there any additional activities we should plan?

(open discussion)

Any pilot project ideas? Expressions of interest via our website:

https://experts.cen.eu/key-initiatives/open-source-solutions/ or

https://experts.cenelec.eu/key-initiatives/open-source-solutions/

Any other questions etc? Email oss@cencenelec.eu