European Standardization Organizations

Workshop for Standards Users

2021-10-14 | Project 4: Open Source Solutions

Welcome

Amanda Saunders | BSI (UK) | Workshop host

Agenda

Welcome & project summary (20 mins)

Technical solutions (20 mins)

Processes (20 mins)

Participation and Funding (20 mins)

Licensing and IPR (20 mins)

Your views & Q&A (10 mins)

Next steps (10 mins)

Purpose

Target audience

▶ Individuals and companies that buy and implement standards

Goals of today's session

▶ Understand the challenges users face when implementing particular standards

▶ Investigate how Open Source can benefit standards users

Other upcoming sessions

Date & Time	Target Audience	Topics
Tue 19 Oct 2021 from 10am to 12pm CET	**Members** (various departments, including standardization, publishing and legal)	Workshop – inc. processes, technical tools, licensing and commercials
Fri 15 Oct 2021 from 10am to 12pm CET	**Open source communities** (people who work at the community head offices)	Workshop – inc. processes, technical tools, licensing and commercials

Current list and registration links are on the project site ([CEN](CEN)/CENELEC)

Presenters

Amanda Saunders
BSI (UK)
Workshop host

Shannon Kiernan
CCMC (Europe)
Joint Project Leader

Markus Haspl
ASI (Austria)
Technical Solutions Workstream Member

Camille Cloître
AFNOR (France)
Operationalization Workstream Leader

Jasnam Channe
BSI (UK)
Business Model Workstream Member

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
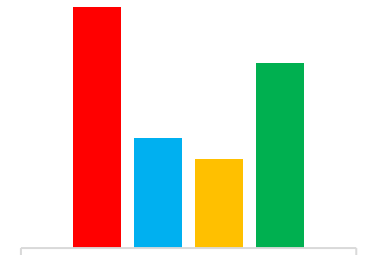- ▶ Silence ≠ agreement

Materials afterwards

- ▶ Slides on public project site ([CEN](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?
- ▶ Are you a standards user?
- ▶ Is this your first session?

Project summary

Shannon Kiernan | CCMC (Europe) | Joint project leader

What is open source?

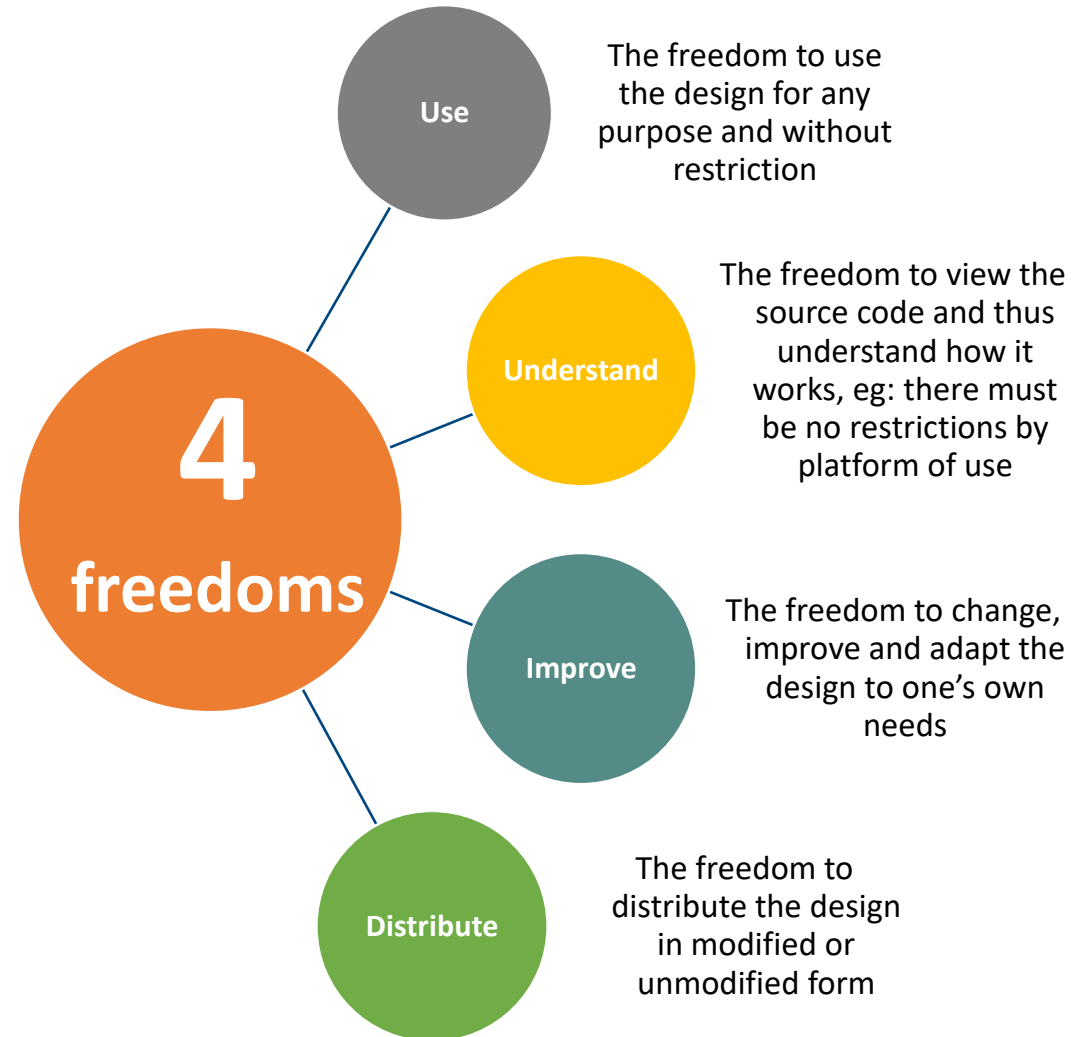# What is open source?

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
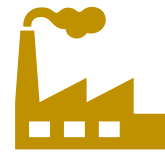
▶ **Reference implementation**

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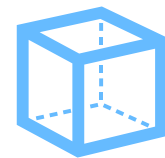
▶ **Testing tool**

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.
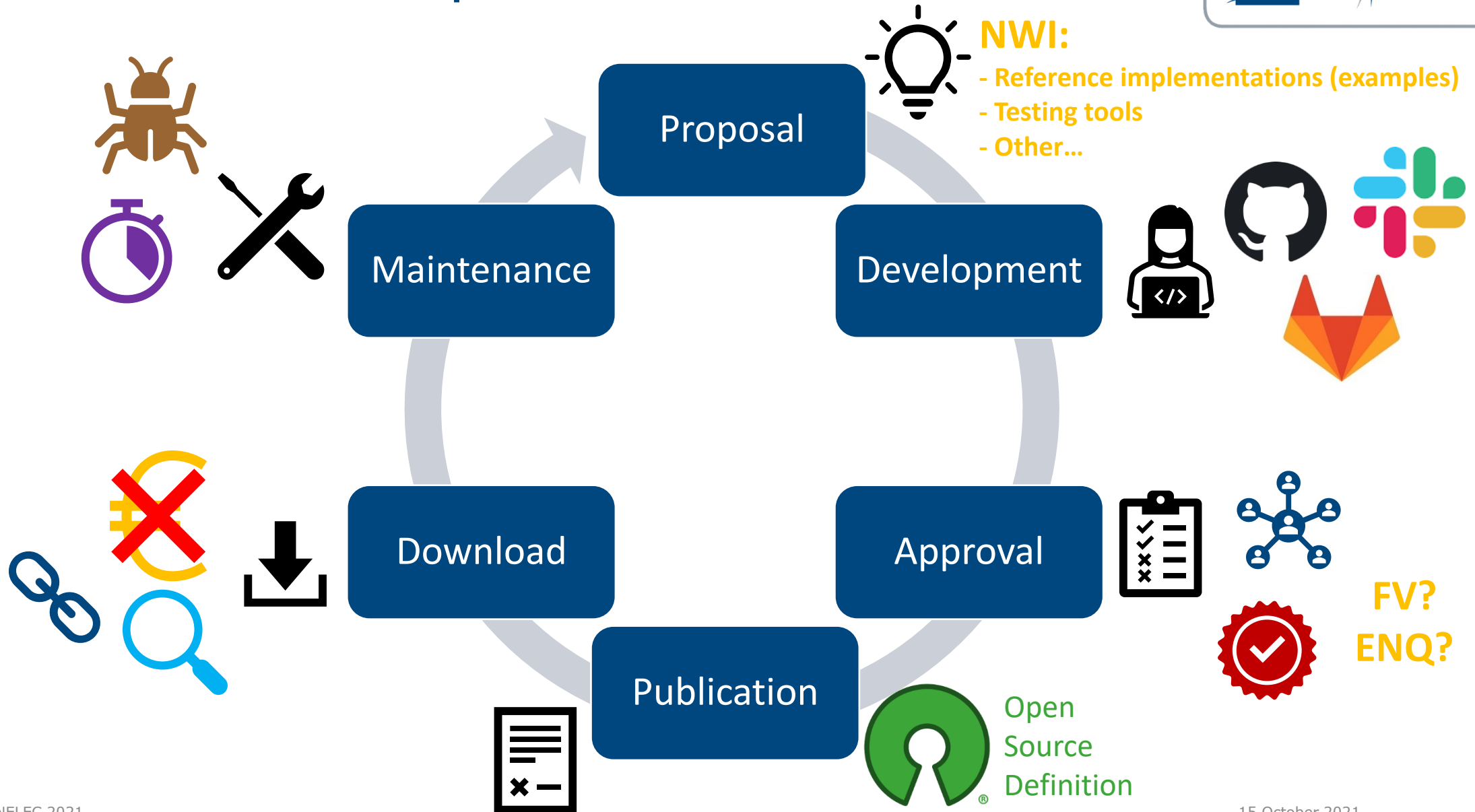
You have to return/publish changes

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

2017

2018

2019

2020

Updated charter approved

2021

2022

Framework in place

2023

Technical Solutions

Markus Haspl | ASI (Austria) | Technical Solutions workstream member

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
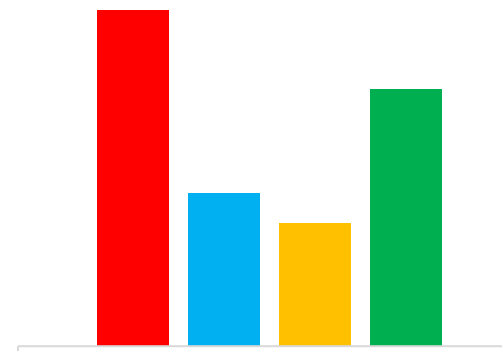
▶ GitHub

▶ GitLab

Pilot communication tools

▶ Slack

Questions for you (Zoom polls)

▶ Do you have experience with open-source development environments?

▶ What repository would you like to use?

▶ How detailed should metadata be defined for the pilot project findings to be meaningful?
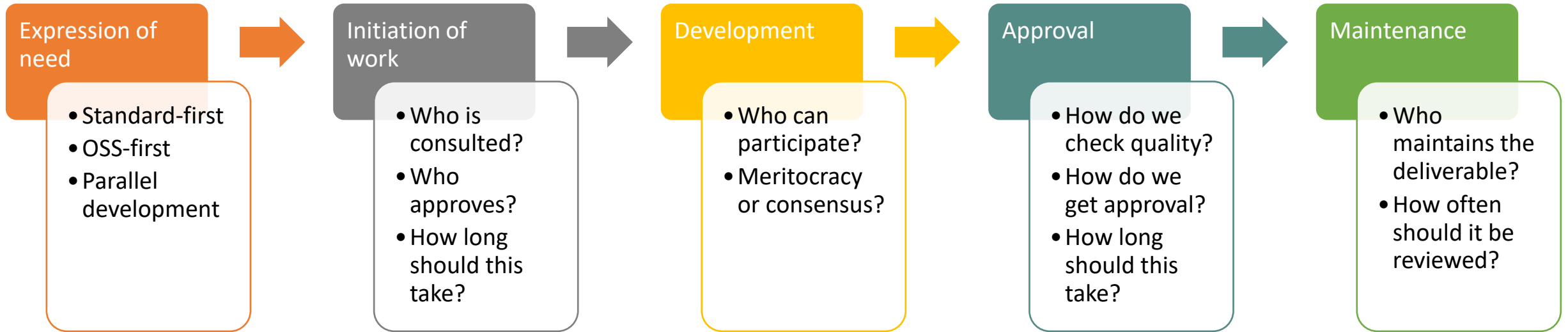
▶ Do you prefer cloud or on-premise repositories?

Processes

Camille Cloitre | AFNOR (France) | Operationalization workstream leader

The context

Key questions:

Expression of need		Initiation of work		Development		Approval		Maintenance
• Standard-first • OSS-first • Parallel development	→	• Who is consulted? • Who approves? • How long should this take?	→	• Who can participate? • Meritocracy or consensus?	→	• How do we check quality? • How do we get approval? • How long should this take?	→	• Who maintains the deliverable? • How often should it be reviewed?

Questions for you (Zoom poll)

▶ What process stage do you think is most crucial for success?

▶ What kind of maintenance scheme should we promote?
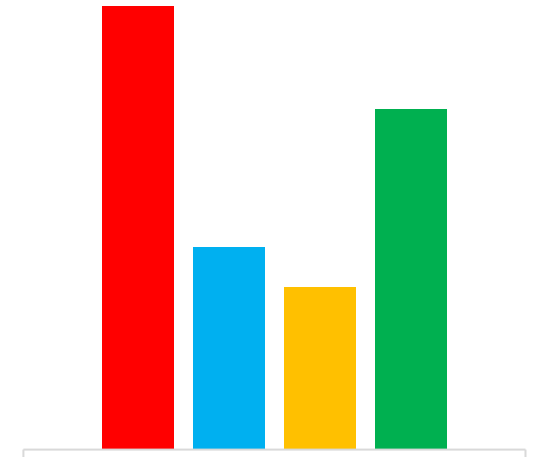
Questions for you (open discussion)

▶ How can we best identify needs for new OSS-type of deliverables?

    ▶ In particular, how can we build from feedback from standards users?

▶ How do we make sure users know which version to use?

Participation and Funding

Jasnam Channe | BSI (UK) | Business model workstream

The Context – For standards users

▶ Understand how standards are used, and the challenges users face on implementation.

▶ Investigate how Open Source can benefit standards users in implementing standards.

Questions for you (Zoom poll)

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

▶ Do you have any experience with using standards that contain code (either as text in a file or as a separate attachment)?

▶ Do you see yourself using an Open Source deliverable alongside purchasing its related standard?
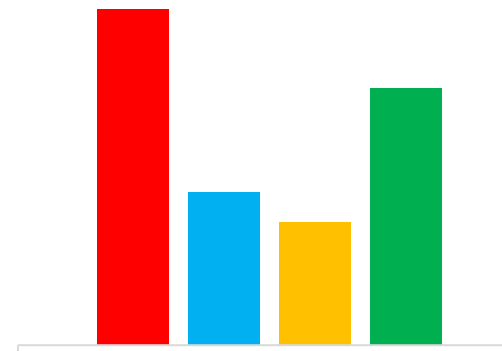
Questions for you (Open discussion)

▶ What are your biggest challenges with applying a standard you purchase? How could the OS Solutions project help with this?

The Context – Funding

Standards Community Funding Model

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

NSBs: 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 (Open discussion)

▶ As users of the standards would you be interested in remaining involved in the collaboration between OS and Standardization? What are the potential incentives?

- What you feel would be a successful outcome?
- Any recommended resources?

Licensing and IPR

Camille Cloitre | AFNOR (France) | Operationalization workstream leader

The context & plan so far

Challenge : Accommodate the IPR & Licensing Policies used by Open Source Communities, following the Open Source Definition, 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

What is the CEN-CLC standards process?

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

Funding – currently considering:

▶ Sponsorship, eg: EC

▶ Pay to participate, like CWAs

▶ Exploring how open source communities generate revenue

Questions for you (Zoom poll)

▶ Have you encountered any legal questions or issues when using code from a standardization deliverable?

▶ 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?
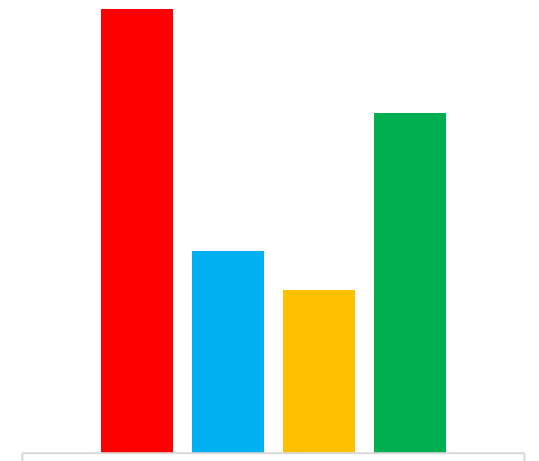
Questions for you (open discussion)

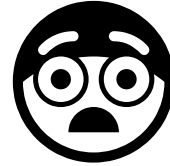▶ What OSI Licenses or License types would you like CEN-CLC to support? Why?

Your views

Shannon Kiernan | CCMC (Europe) | Joint project leader

How do you feel about the project?
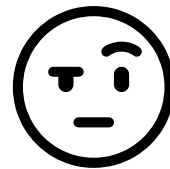
Excited
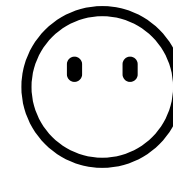"Bring it on!"

Scared
"What will this mean for…?"

Angry
"But if you do that, then…!"

Interested
"I wonder what will happen"
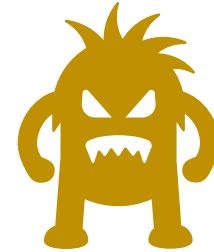
Confused
"I don't get it"

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 upcoming sessions

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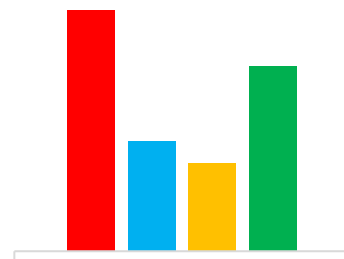Current list and registration links are on the project site (CEN/CENELEC)

Other activities

Are there 2 or 3 volunteers to represent **standards users** 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